ISO-QUALITY TESTING, INC.

GLOBAL COMPUTERIZED EXAMINATION SOLUTIONS

Center for Financial Certifications ("CFC") Certification Management User Manual (Part 1)

2012

All rights reserved. No part of this publication may be reproduced, distributed or disclosed in any form or by any means, or stored in a database retrieval system, without the prior written permission of IQT, Inc.

CONFIDENTIAL

Copyright ISO-Quality Testing, Inc. 2012

ISO-QUALITY TESTING, INC.
GLOBAL COMPUTERIZED EXAMINATION SOLUTIONS

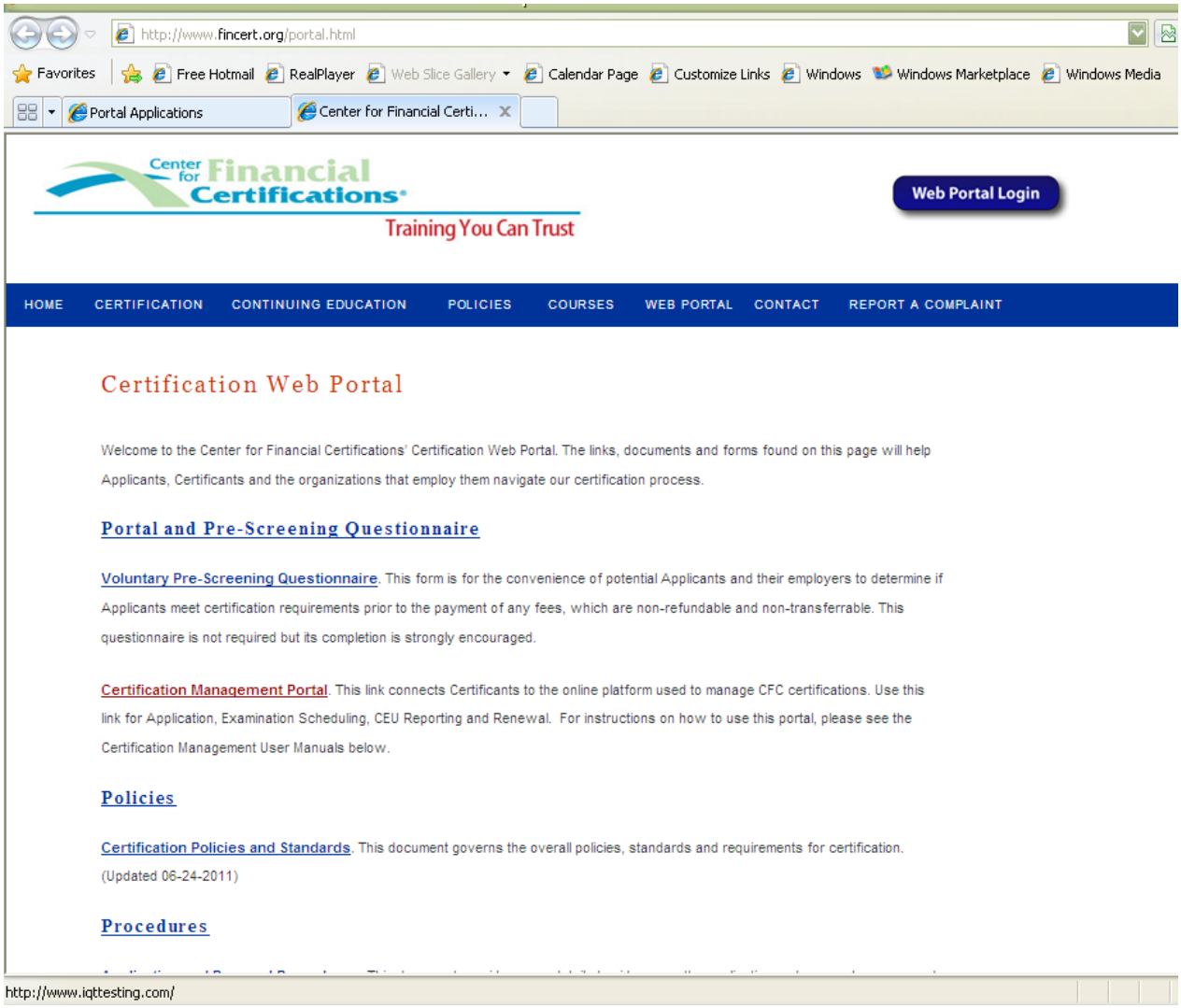
Table of Contents

Application 2
Scheduling an Exam 17
Printing a Certification Letter 28

Copyright ISO-Quality Testing 2011

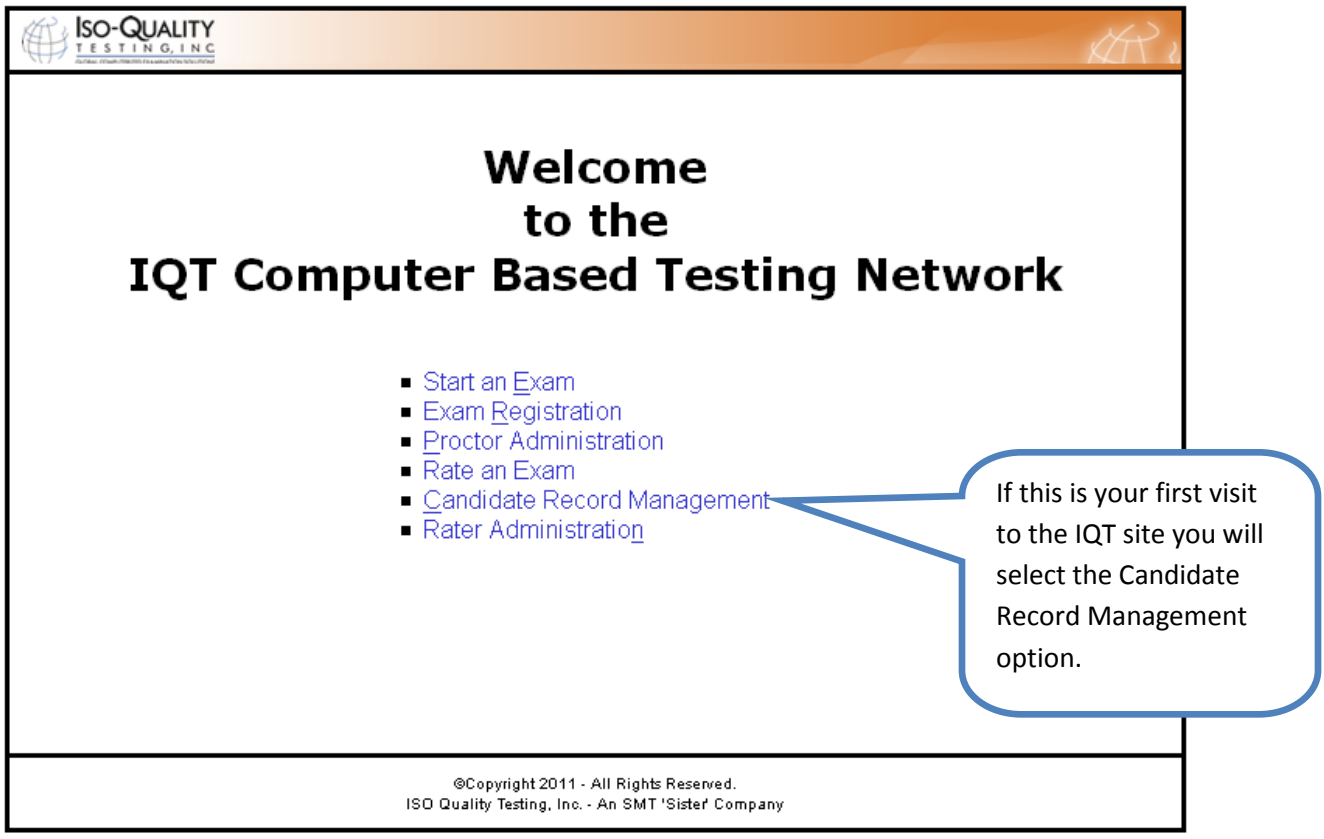
Application

1. Go to http://www.fincert.org/portal.html and select the "Certification Management Portal" link.


http://www.fincert.org/portal.html
Favorites
Free Hotmail
RealPlayer
Web Slice Gallery
Calendar Page
Customize Links
Windows
Windows Marketplace
Windows Media
Portal Applications
Center for Financial Certi...
Center for Financial Certifications
Training You Can Trust
Web Portal Login
HOME
CERTIFICATION
CONTINUING EDUCATION
POLICIES
COURSES
WEB PORTAL
CONTACT
REPORT A COMPLAINT
Certification Web Portal
Welcome to the Center for Financial Certifications' Certification Web Portal. The links, documents and forms found on this page will help Applicants, Certificants and the organizations that employ them navigate our certification process.
Portal and Pre-Screening Questionnaire
Voluntary Pre-Screening Questionnaire. This form is for the convenience of potential Applicants and their employers to determine if Applicants meet certification requirements prior to the payment of any fees, which are non-refundable and non-transferrable. This questionnaire is not required but its completion is strongly encouraged.
Certification Management Portal. This link connects Certificants to the online platform used to manage CFC certifications. Use this link for Application, Examination Scheduling, CEU Reporting and Renewal. For instructions on how to use this portal, please see the Certification Management User Manuals below.
Policies
Certification Policies and Standards. This document governs the overall policies, standards and requirements for certification. (Updated 06-24-2011)
Procedures
http://www.iqttesting.com/

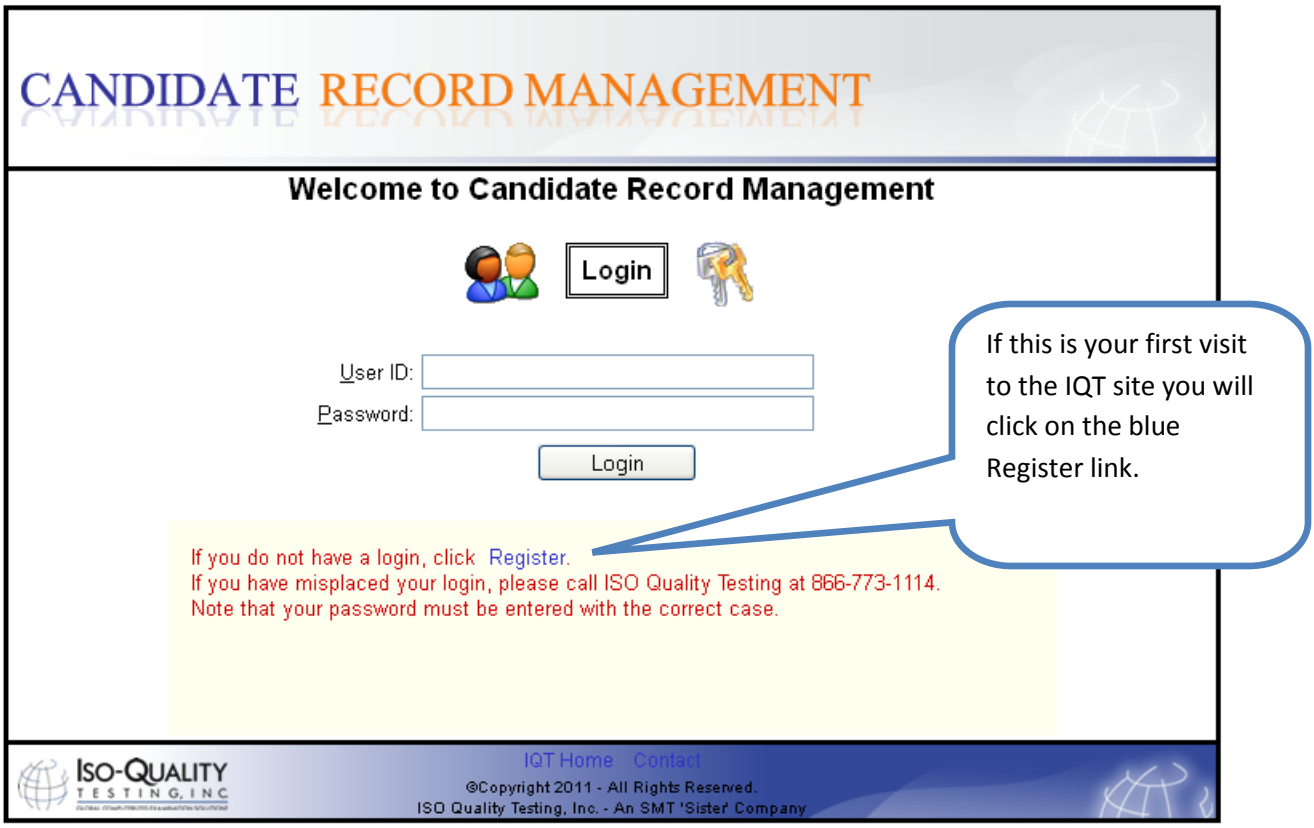
Copyright ISO-Quality Testing 2011

2. Once on the IQT home page you will select the fifth option Candidate Record Management.


ISO-QUALITY TESTING, INC
Welcome
to the
IQT Computer Based Testing Network
Start an Exam
Exam Registration
Proctor Administration
Rate an Exam
Candidate Record Management
Rater Administration
If this is your first visit to the IQT site you will select the Candidate Record Management option.
©Copyright 2011 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

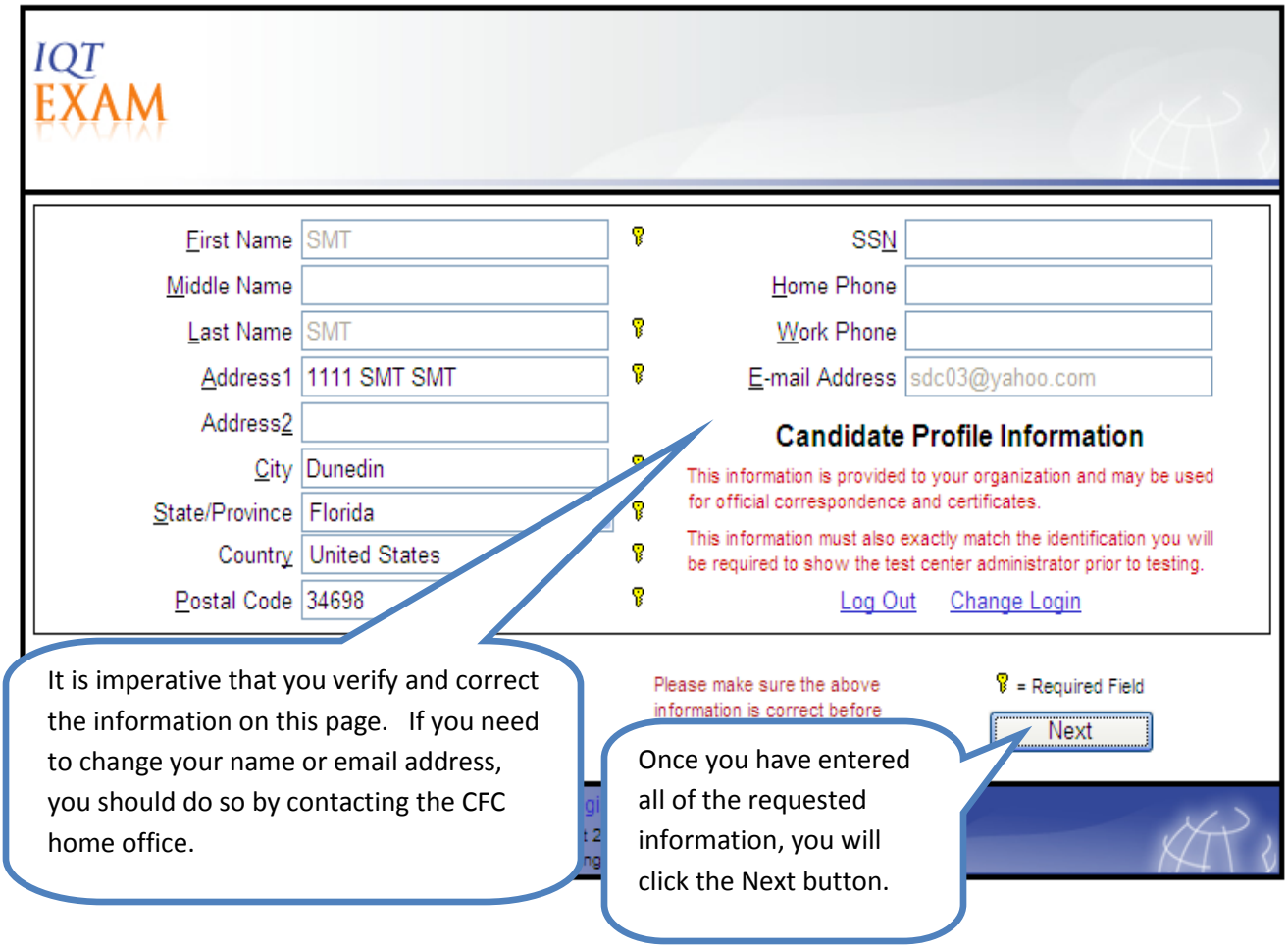
Copyright ISO-Quality Testing 2011

3. If you have your IQT UserID and Password enter it now and skip to step 6. If this is your first visit to the IQT Login Page click the blue Register link.


CANDIDATE RECORD MANAGEMENT
Welcome to Candidate Record Management
Login
User ID:
Password:
Login
If you do not have a login, click Register.
If you have misplaced your login, please call ISO Quality Testing at 866-773-1114.
Note that your password must be entered with the correct case.
If this is your first visit to the IQT site you will click on the blue Register link.
IQT Home Contact
©Copyright 2011 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

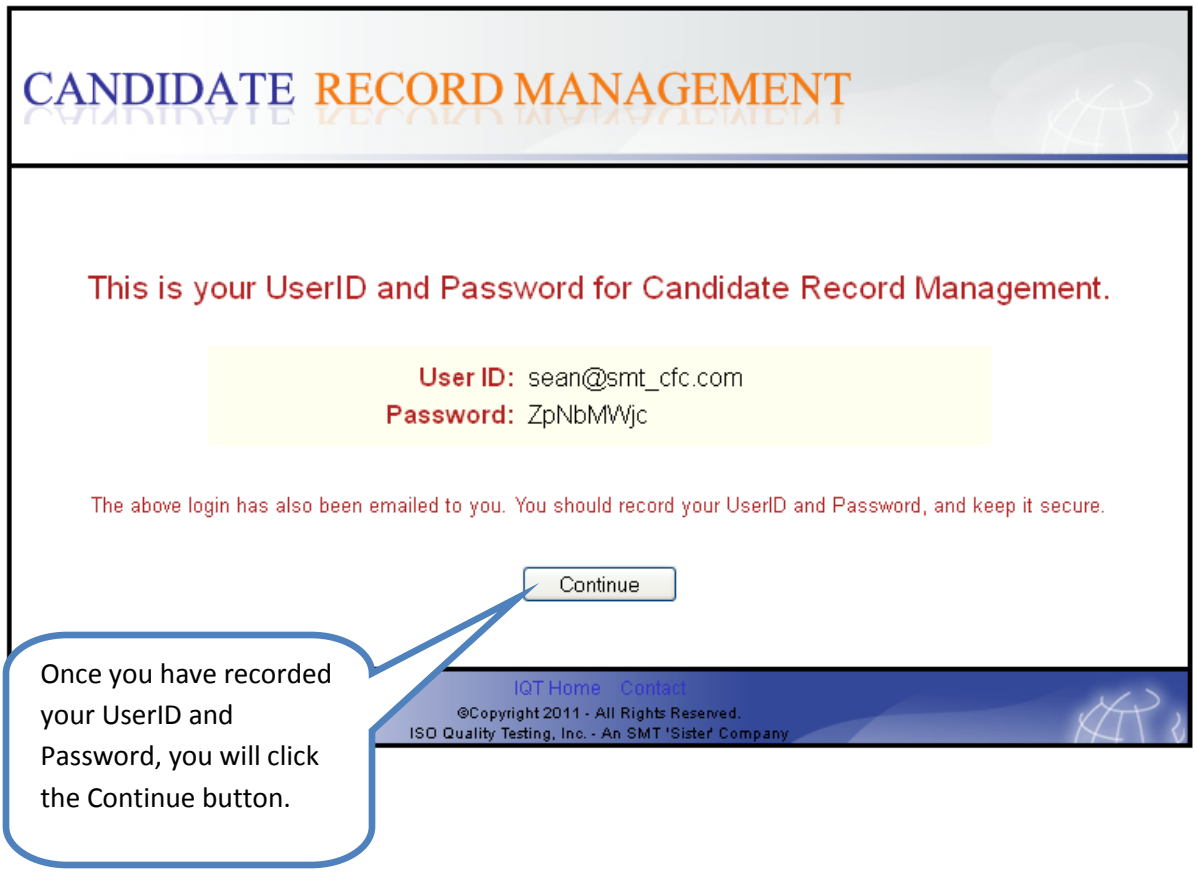
Copyright ISO-Quality Testing 2011

4. You will now need to fill in the below profile information.


IQT
EXAM
First Name SMT
Middle Name
Last Name SMT
Address1 1111 SMT SMT
Address2
City Dunedin
State/Province Florida
Country United States
Postal Code 34698
SSN
Home Phone
Work Phone
E-mail Address sdc03@yahoo.com
Candidate Profile Information
This information is provided to your organization and may be used for official correspondence and certificates.
This information must also exactly match the identification you will be required to show the test center administrator prior to testing.
Log Out
Change Login
Please make sure the above information is correct before
= Required Field
Next
It is imperative that you verify and correct the information on this page. If you need to change your name or email address, you should do so by contacting the CFC home office.
Once you have entered all of the requested information, you will click the Next button.

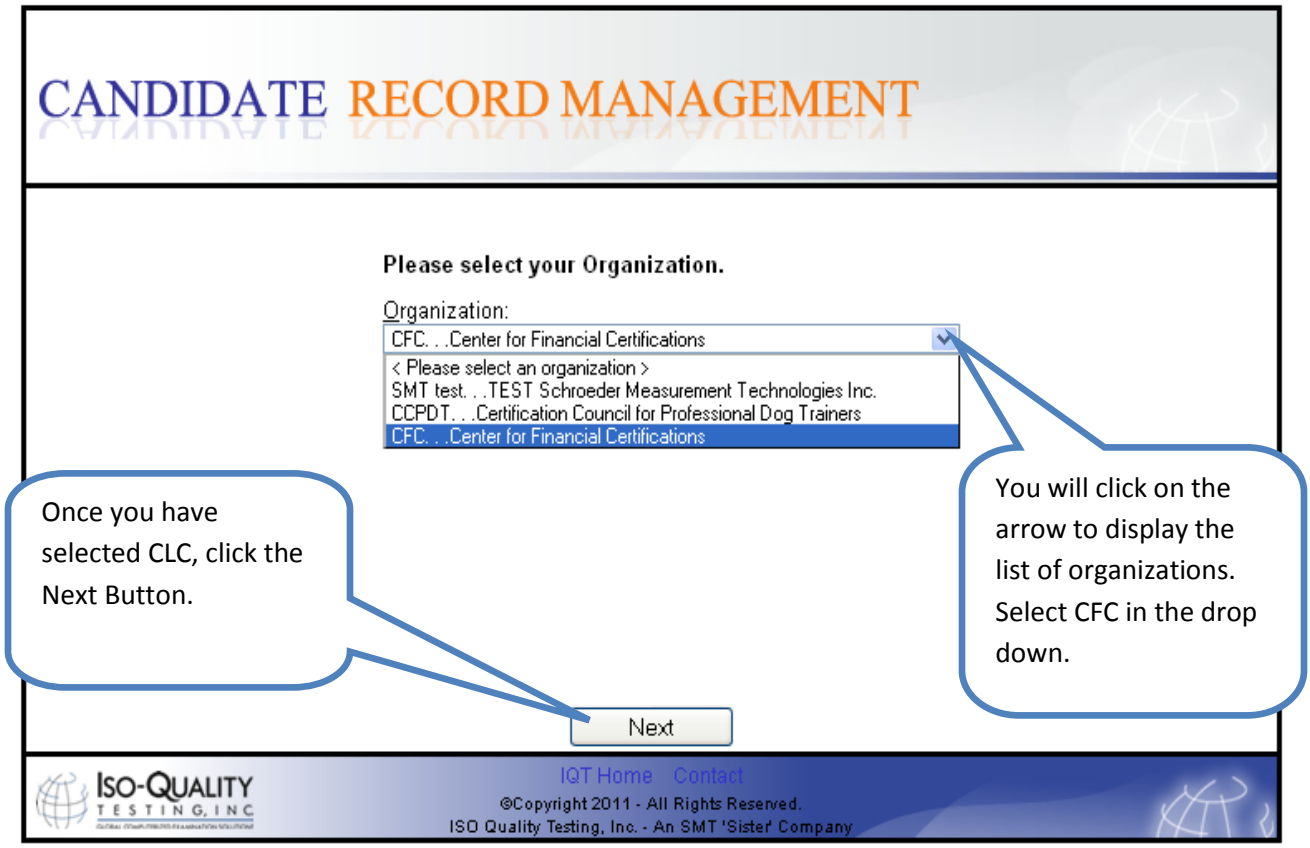
Copyright ISO-Quality Testing 2011

5. Once you have entered your profile information and clicked on the next button you will receive your IQT UserID and Password. Please keep your UserID and Password some where safe, as you will need this to schedule your exam, update your CEU's, and renew your certification.


CANDIDATE RECORD MANAGEMENT
This is your UserID and Password for Candidate Record Management.
User ID: sean@smt_cfc.com
Password: ZpNbMWjc
The above login has also been emailed to you. You should record your UserID and Password, and keep it secure.
Continue
IQT Home Contact
©Copyright 2011 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company
Once you have recorded your UserID and Password, you will click the Continue button.

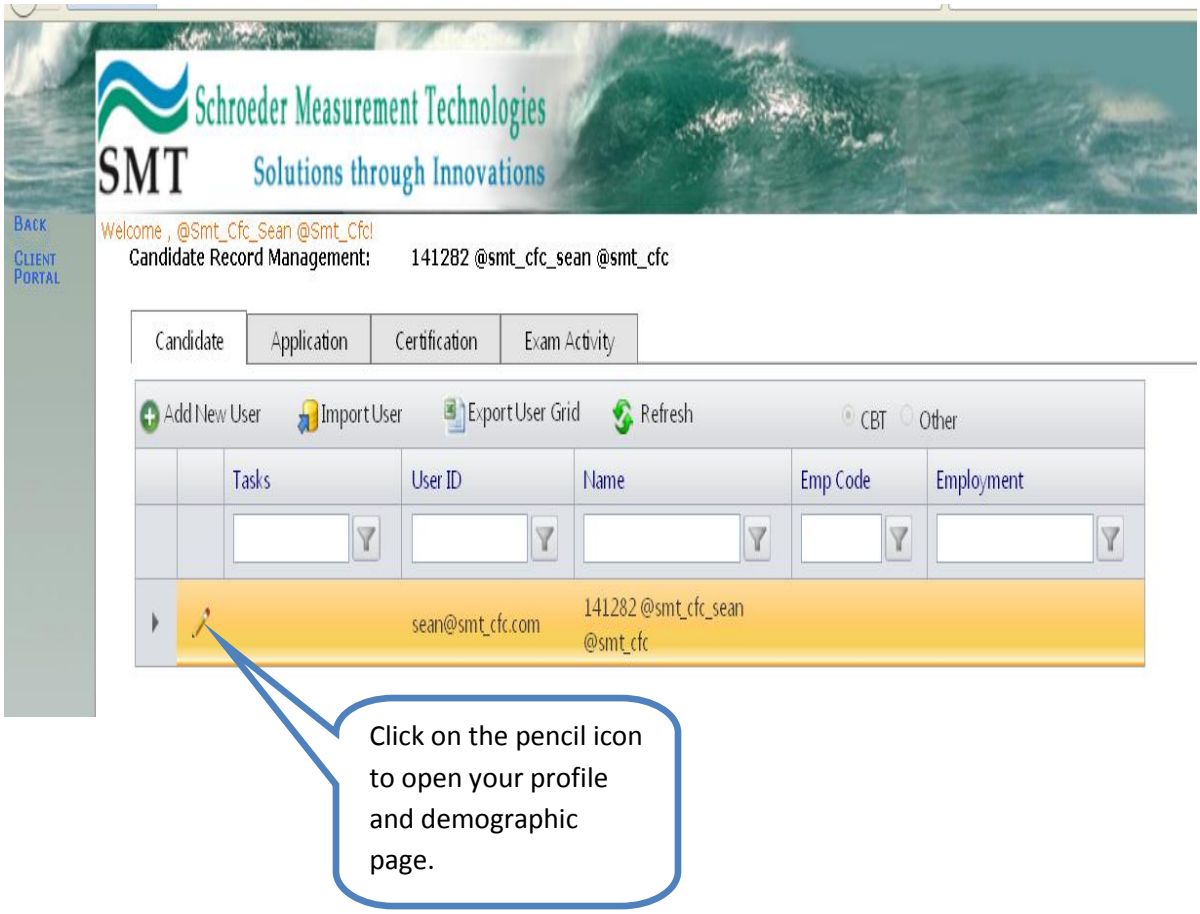
Copyright ISO-Quality Testing 2011

6. You will now select “CFC…Center for Financial Certification” from the drop down.


CANDIDATE RECORD MANAGEMENT
Please select your Organization.
Organization:
CFC. . .Center for Financial Certifications
< Please select an organization >
SMT test. . .TEST Schroeder Measurement Technologies Inc.
CCPDT. . .Certification Council for Professional Dog Trainers
CFC. . .Center for Financial Certifications
Once you have selected CLC, click the Next Button.
You will click on the arrow to display the list of organizations. Select CFC in the drop down.
Next
IQT Home Contact
©Copyright 2011 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

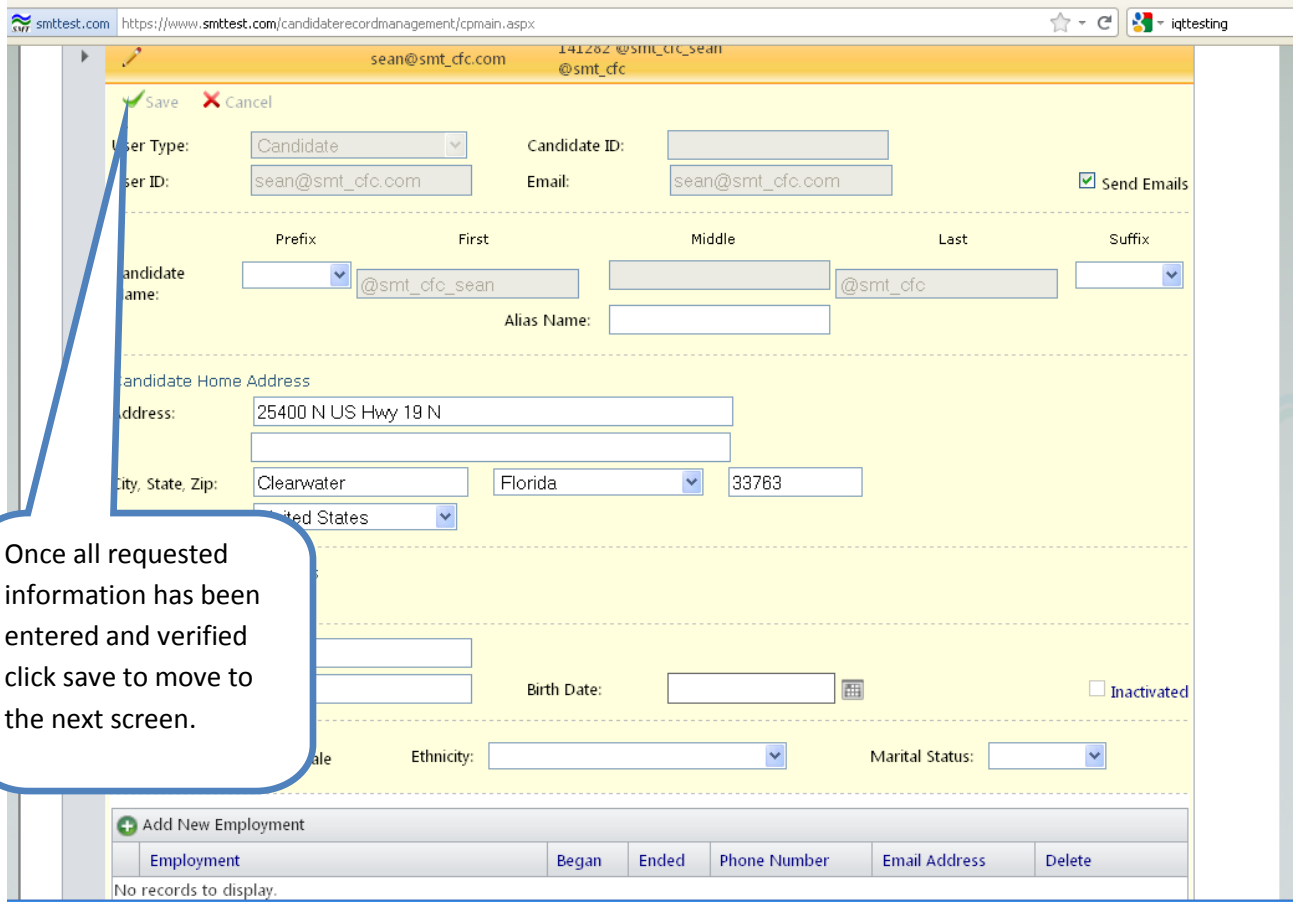
Copyright ISO-Quality Testing 2011

7. You will now be directed to your Candidate Record Management Profile screen. You will manage all aspects of your of your CFC certification from this page. The first thing you will need to do is complete and verify your profile and demographic information.



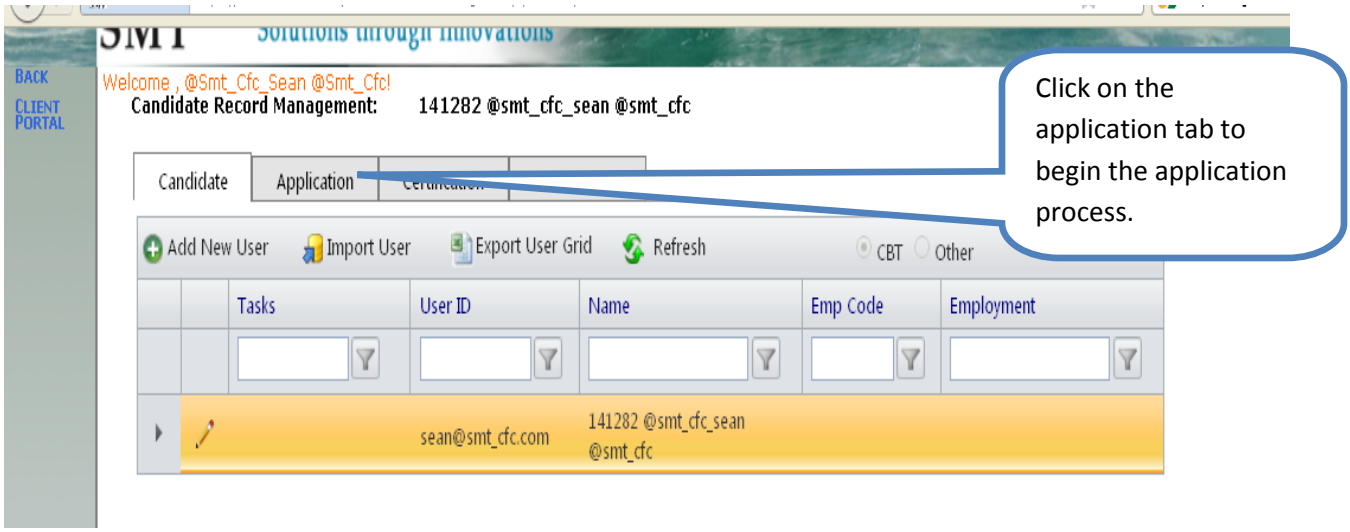
Copyright ISO-Quality Testing 2011

8. Please complete any missing information, verify the populated information is correct, and confirm the information is accurate.

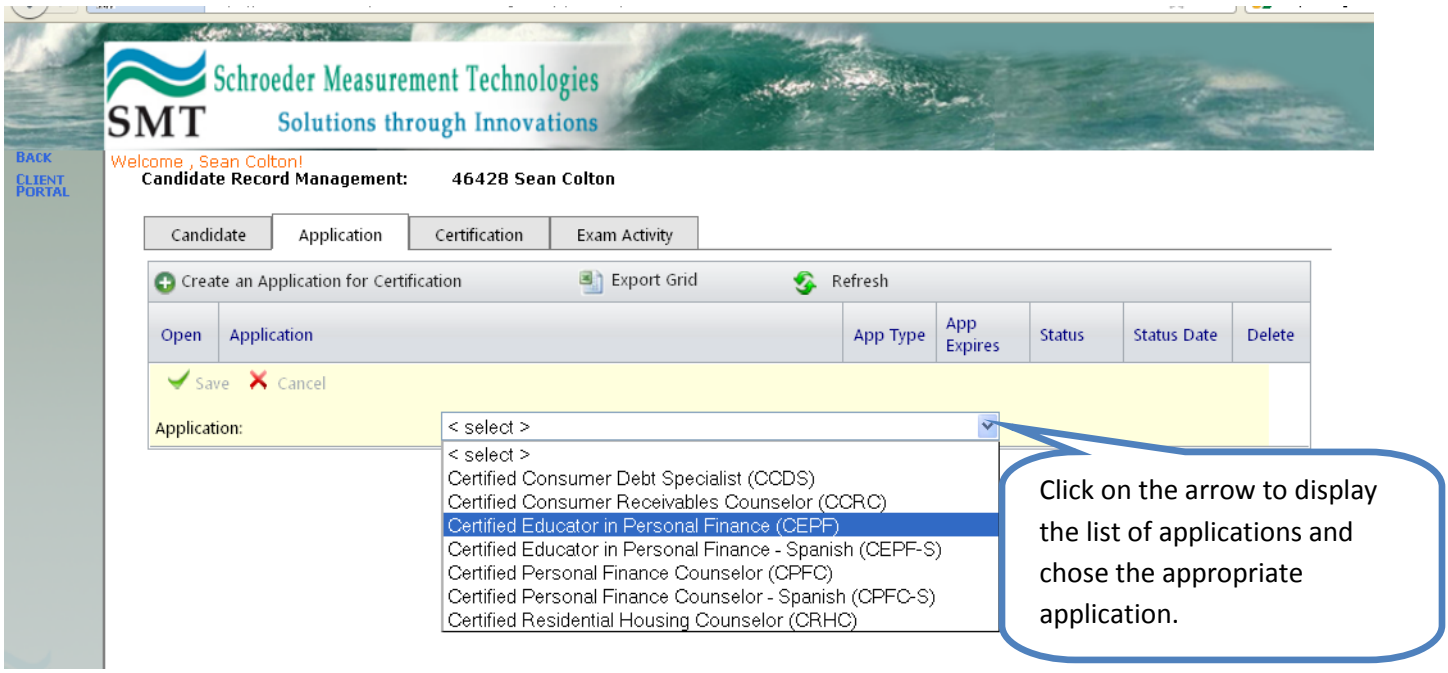


Copyright ISO-Quality Testing 2011

9. Once you have completed and verified your profile and demographic information, you will start the application process. To begin the application process you will select the application tab.

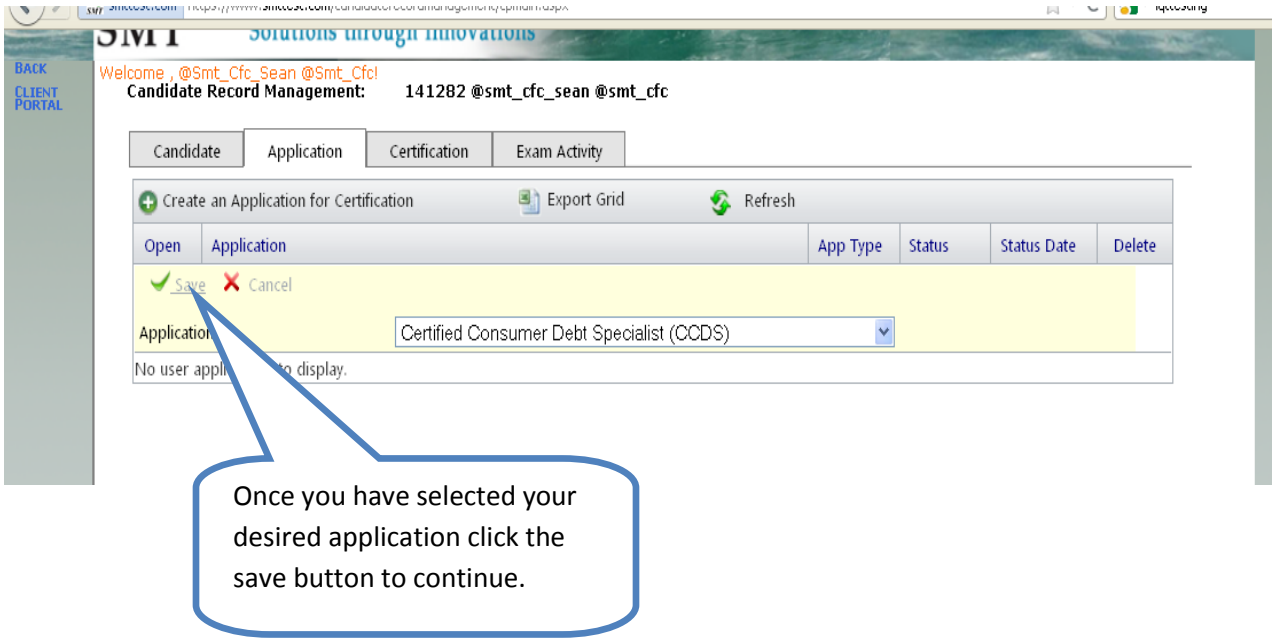


10. You will now need to select the title of the application you wish to complete. In the drop down select the appropriate application.

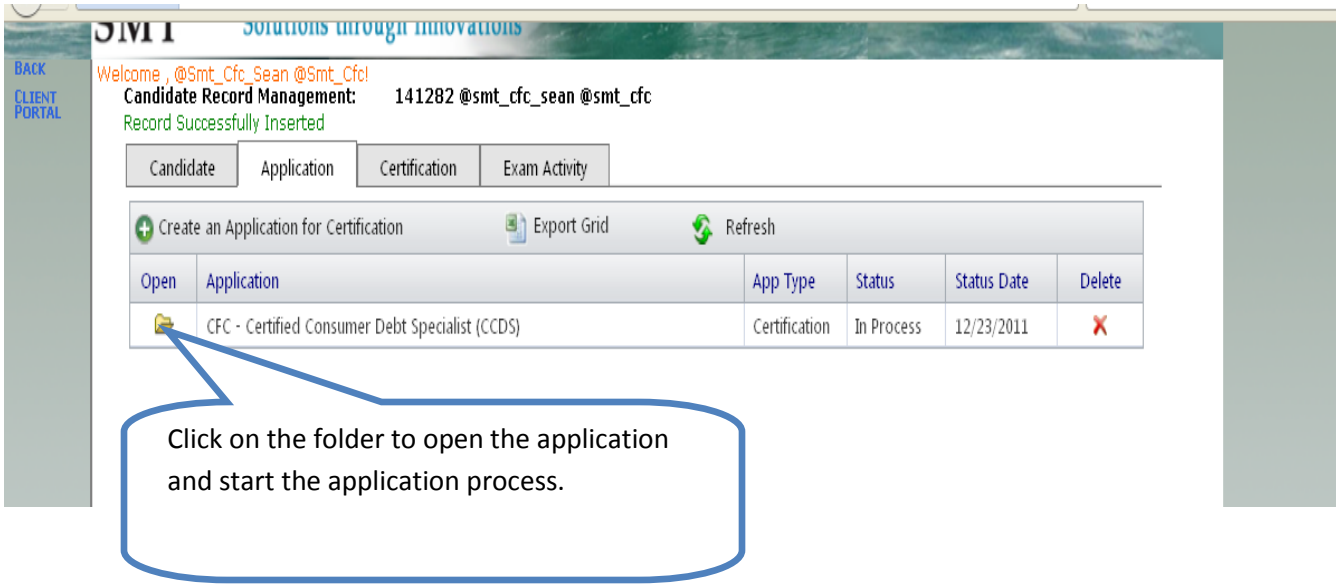


Copyright ISO-Quality Testing 2011

11. You will now need to save your desired application by clicking the save link.

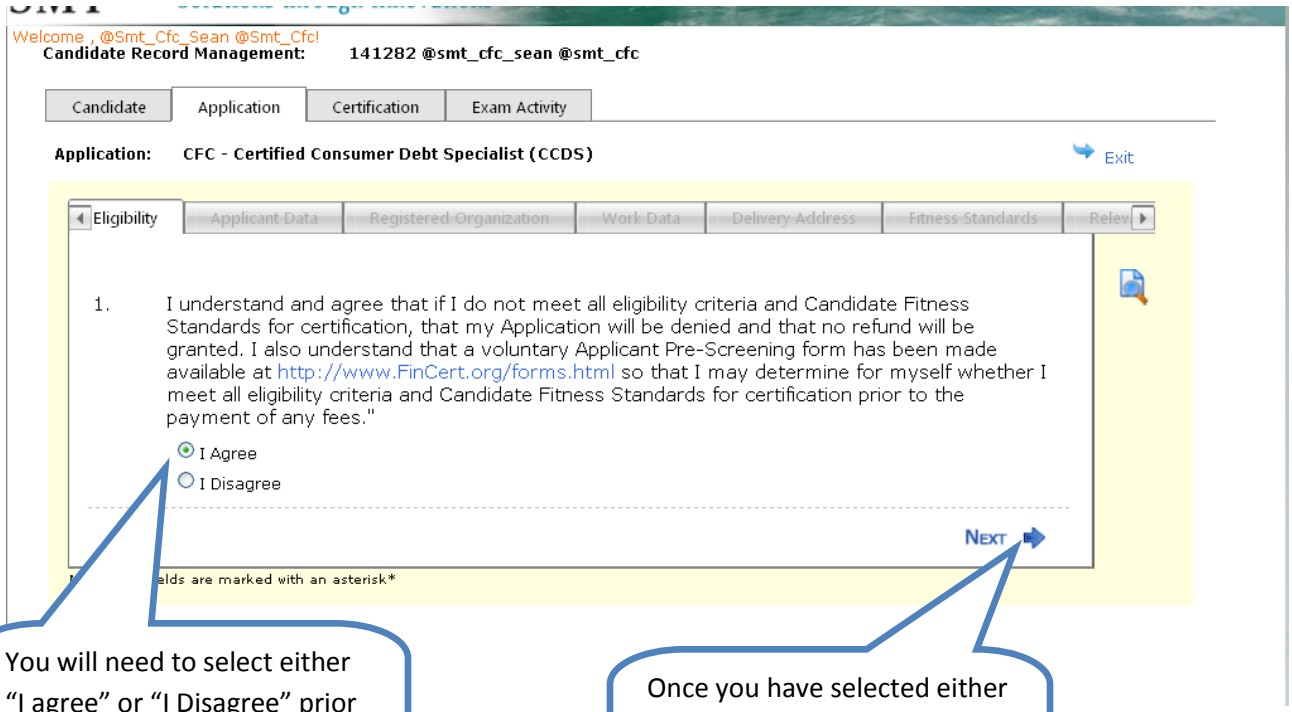


12. You are now ready to begin the application process. You will open your application by clicking the folder to the left of your application title.



Copyright ISO-Quality Testing 2011

13. The first item in the application is the affirmation. Please read carefully and select "I Agree" or "I Disagree". It is important to note, if you do select "I Disagree" your application will end immediately. You will be able to reapply when you do agree to the terms set forth by the CFC.

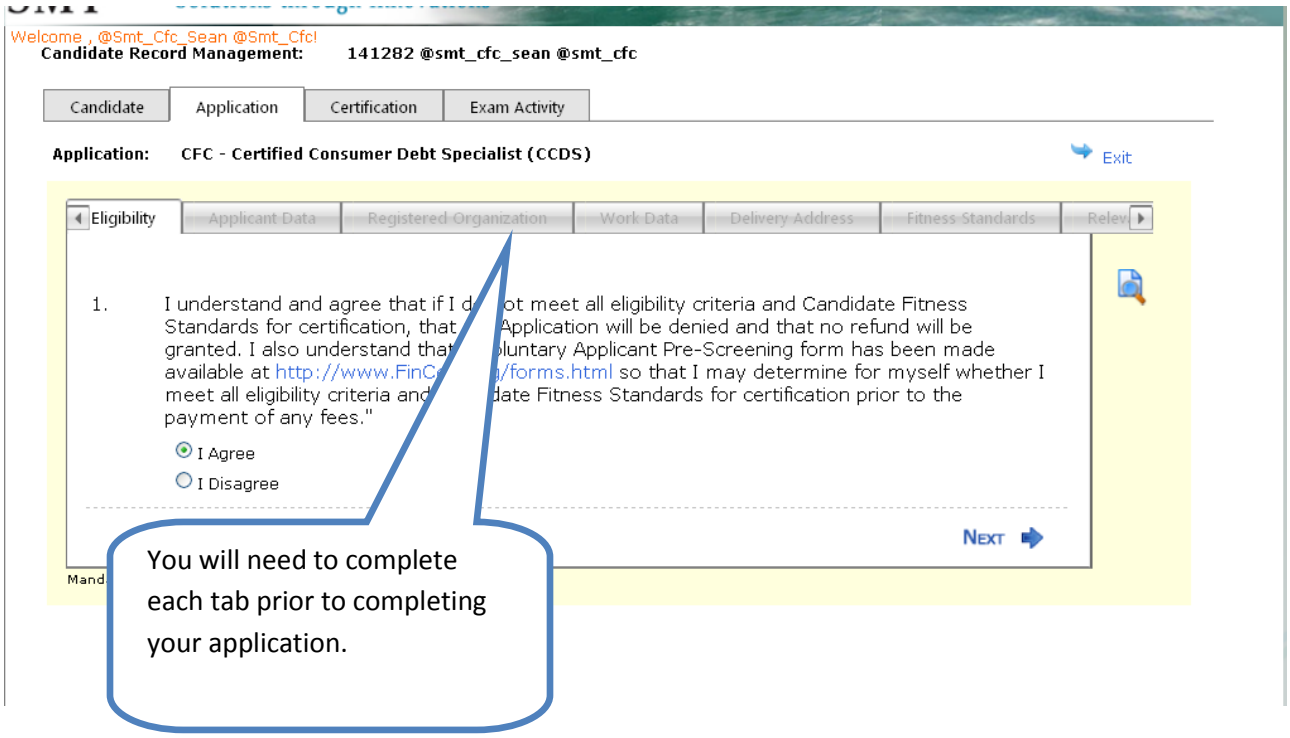

Welcome , @Smt_Cfc_Sean @Smt_Cfc!
Candidate Record Management: 141282 @smt_cfc_sean @smt_cfc
Candidate
Application
Certification
Exam Activity
Application: CFC - Certified Consumer Debt Specialist (CCDS)
Exit
Eligibility
Applicant Data
Registered Organization
Work Data
Delivery Address
Fitness Standards
1. I understand and agree that if I do not meet all eligibility criteria and Candidate Fitness Standards for certification, that my Application will be denied and that no refund will be granted. I also understand that a voluntary Applicant Pre-Screening form has been made available at http://www.FinCert.org/forms.html so that I may determine for myself whether I meet all eligibility criteria and Candidate Fitness Standards for certification prior to the payment of any fees."
I Agree
I Disagree
Next

You will need to select either "I agree" or "I Disagree" prior to moving from this page.

Once you have selected either option you will click on the next button.

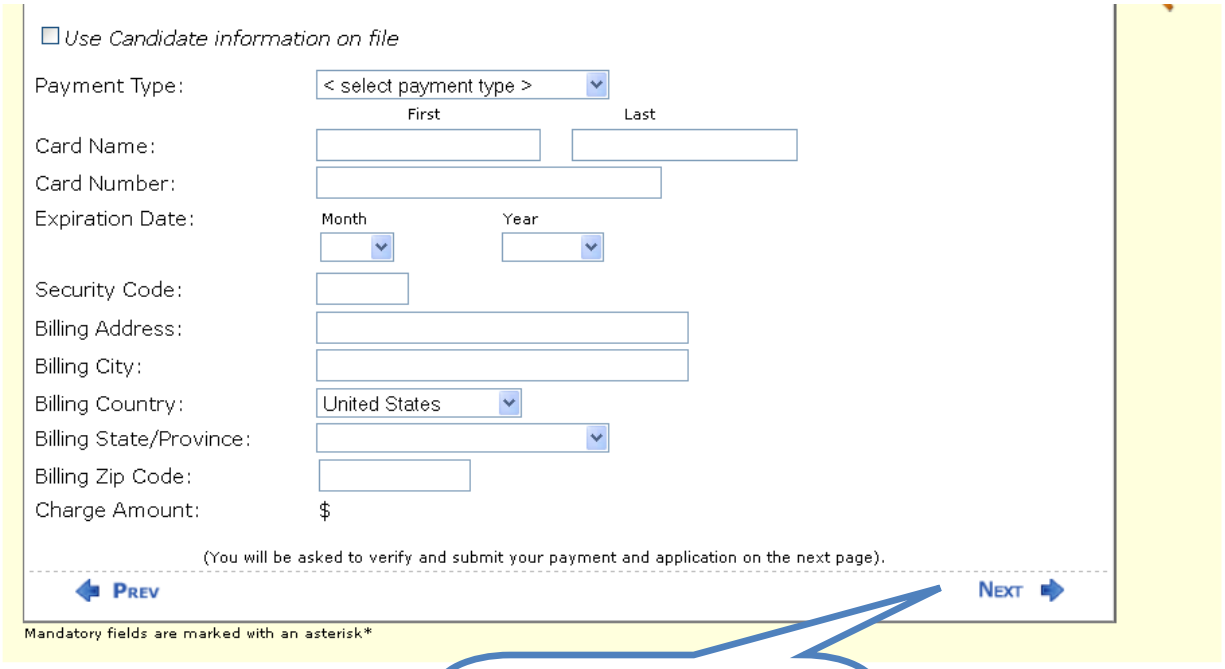
Copyright ISO-Quality Testing 2011

14. You will need to complete the requested information in each tab prior to scheduling your exam.


Welcome , @Smt_Cfc_Sean @Smt_Cfc!
Candidate Record Management: 141282 @smt_cfc_sean @smt_cfc
Candidate
Application
Certification
Exam Activity
Application: CFC - Certified Consumer Debt Specialist (CCDS)
Exit
Eligibility
Applicant Data
Registered Organization
Work Data
Delivery Address
Fitness Standards
1. I understand and agree that if I d ot meet all eligibility criteria and Candidate Fitness Standards for certification, that Application will be denied and that no refund will be granted. I also understand that oluntary Applicant Pre-Screening form has been made available at http://www.FinC /forms.html so that I may determine for myself whether I meet all eligibility criteria and date Fitness Standards for certification prior to the payment of any fees."
I Agree
I Disagree
Next
You will need to complete each tab prior to completing your application.

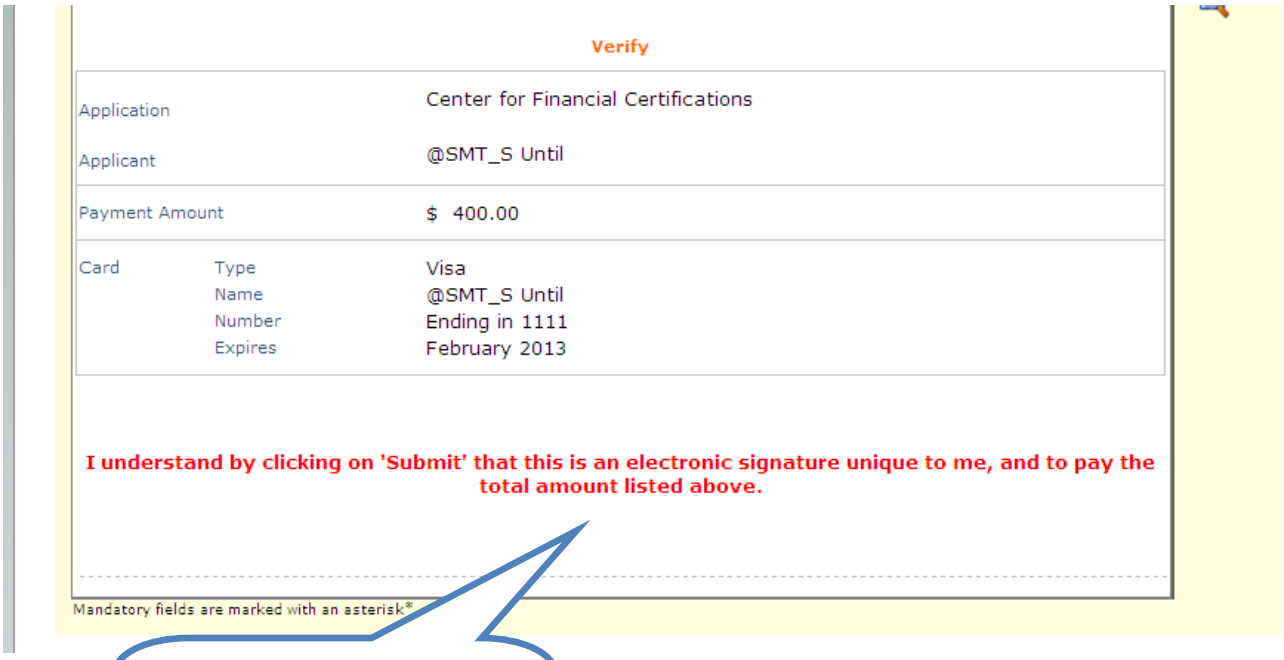
Copyright ISO-Quality Testing 2011

15. Once you have completed the information in each tab you will come to the payment screen. You will enter your payment information and pay the application fee to complete the application process.



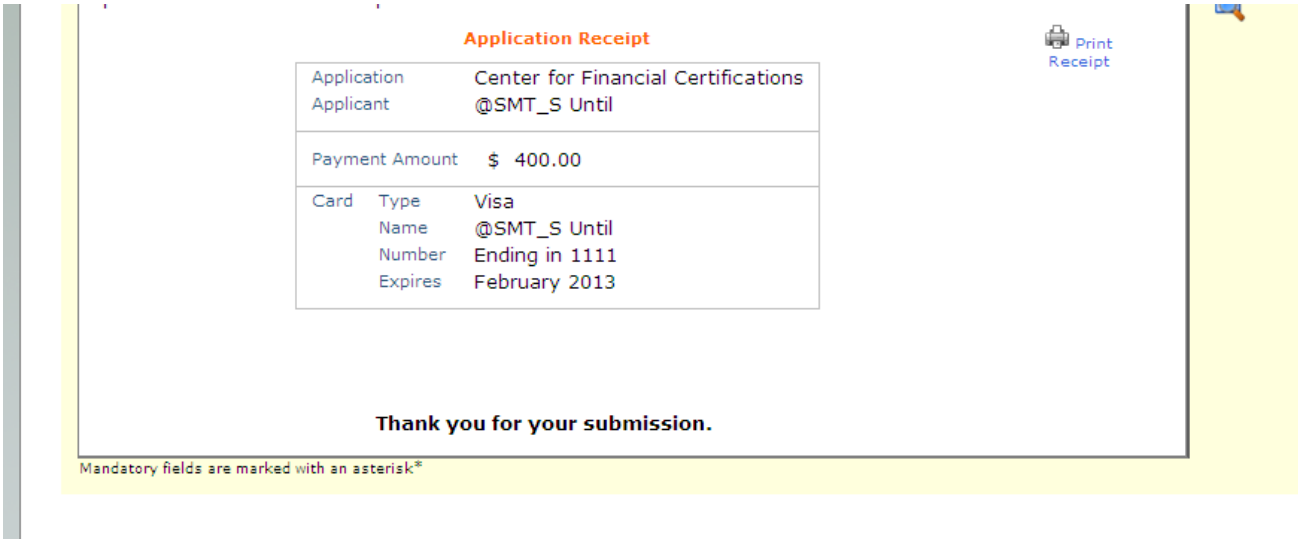
Copyright ISO-Quality Testing 2011

16. Once you have entered your payment information and clicked the next button you will be brought to the verification page. Please review the information and click the Submit button.



Copyright ISO-Quality Testing 2011

17. You will now print and save your receipt as confirmation. You will also be sent an email with further instructions.



Copyright ISO-Quality Testing 2011

Scheduling an Exam

1. Once you have completed the application and have been approved to sit for an exam, you will receive the following email from registrations@isoqualitytesting.com. You will use this email to schedule your exam.

Friday, Dec. 17, 2011

Dear Candidate,

You have now been approved by ******* to schedule an appointment to sit for your examination. Please proceed as follows:

1 -- Go to our home page: www.IQTTesting.com
2 -- Using the option "Exam Registration"
3 -- Enter your Username and Password to login. These are:

Username: **sdc03@yahoo.com**
Password: **vHjg1efO**

4 -- Select the Organization: **********.
5 -- Select the exam: **********

After logging into the IQT website, please follow the on-screen instructions for scheduling an appointment. Please note that you must test within this date range: 01/01/2011 to 12/31/2016.

Reschedule/Cancellation Policy: If you fail to show up for your examination at the scheduled time, do not have the proper identification, or do not have your admission document, you will not be allowed to sit for your exam. You will be considered a 'No-Show', your examination fees will be forfeited, and you will be required to re-register and pay all fees prior to sitting for the exam. However, if an issue arises that prohibits you from making it to your scheduled exam, you may reschedule prior to (5) calendar days before your scheduled exam date. **You may be required to pay a rescheduling fee to process your request**. If it is less than (5) calendar days, you will not be allowed to cancel or reschedule your exam unless one of the following 3 situations have occurred:

Death in the immediate family
Military Deployment
Sickness

Copyright ISO-Quality Testing 2011

If you experience any of the above issues, you **MUST** provide IQT with proper documentation before being rescheduled to a new date. **If none of the above are the reason for wanting to reschedule or cancel your exam less than 5 days prior to your exam date, then you will not be allowed to reschedule or cancel your exam. Please also note that if you do not show up, you will be considered a 'No-Show', your examination fees will be forfeited, and you will be required to re-register for the examination and pay all examination fees prior to sitting for the exam.**

Result Letter: Please note that you **MUST** receive a status letter after completing the exam. **Please do not leave the testing center until this has been given to you by the Proctor.**

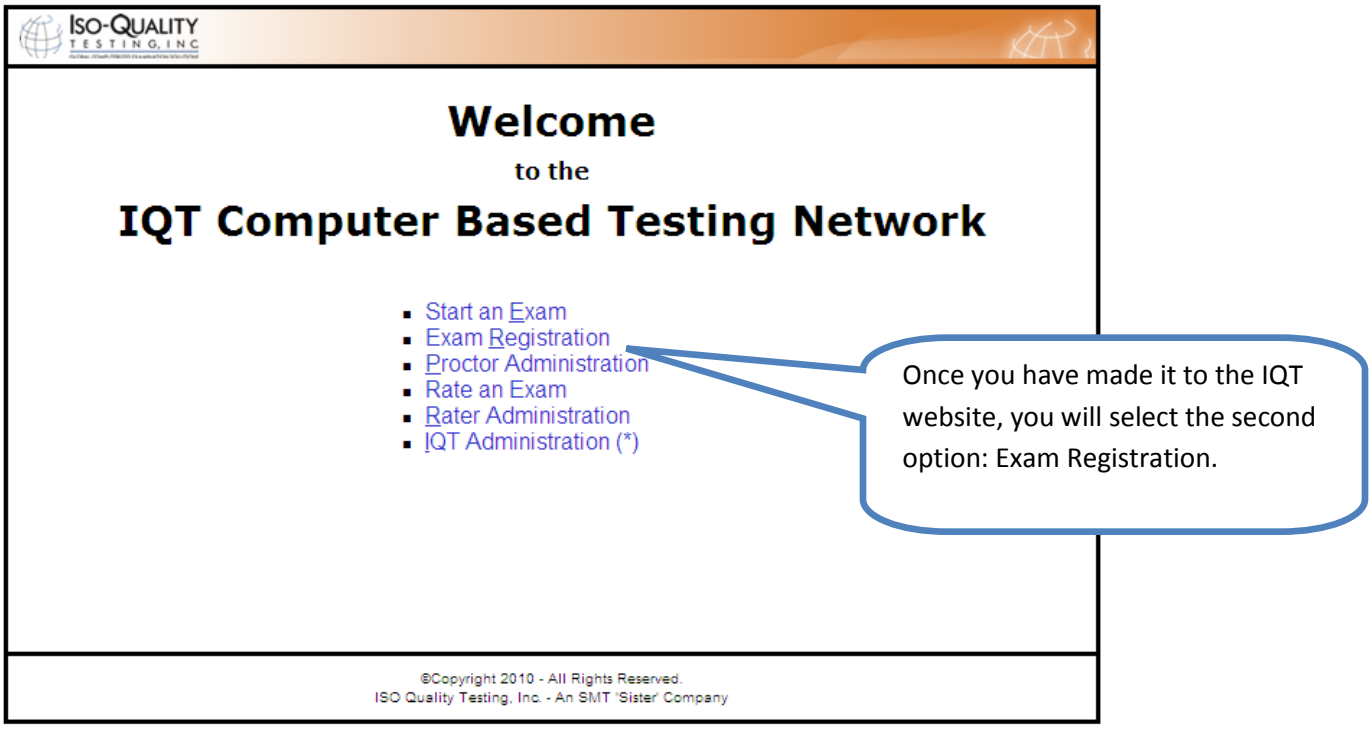
Should you require assistance, please click on the "Contact Us" button on the home page to send a message to customer service, or you may call (toll-free in USA and Canada) 1-866-773-1114, or (other countries) +1 727-733-1110.

Sincerely,

Iso-Quality Testing, Inc.

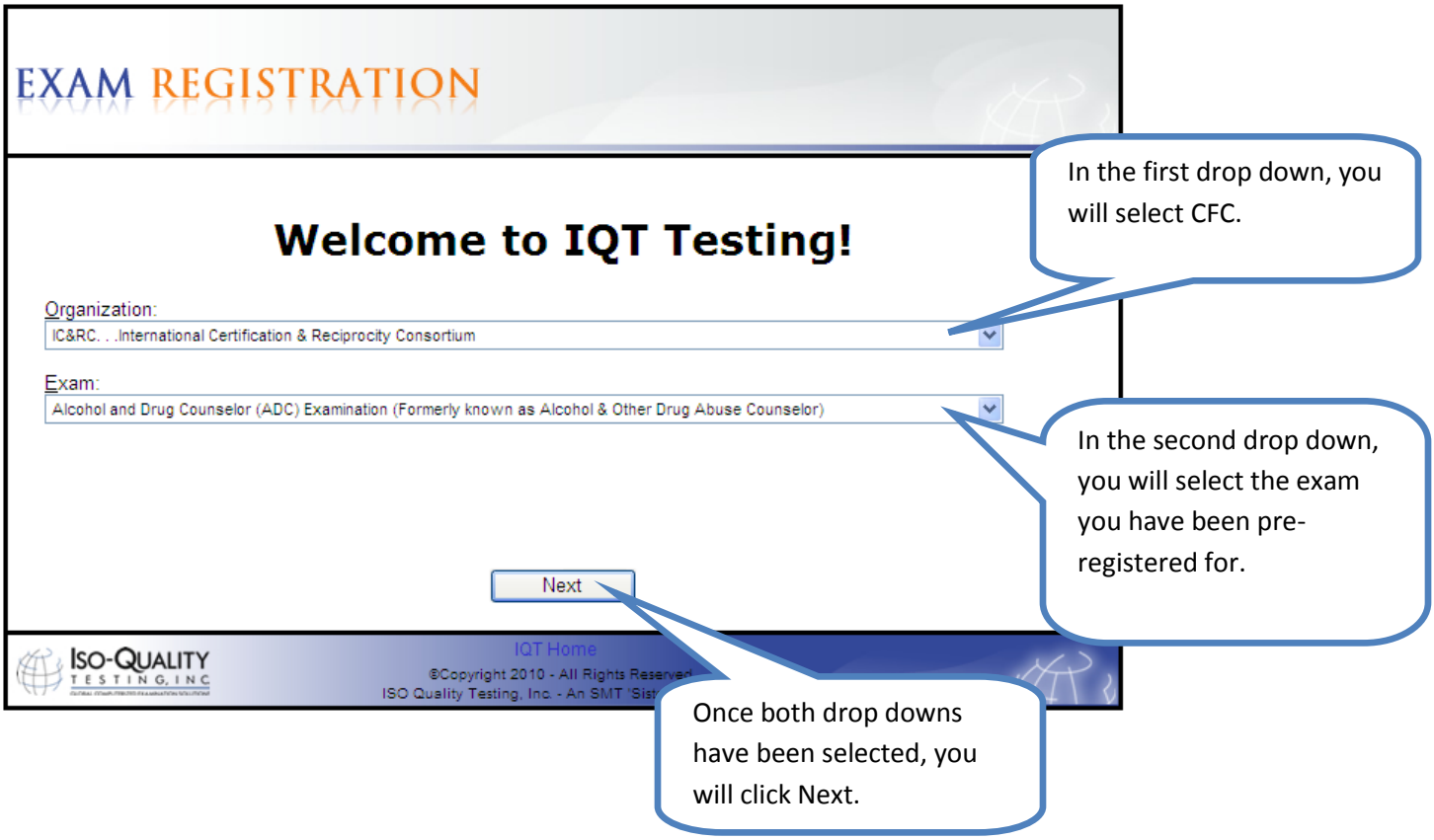
Copyright ISO-Quality Testing 2011

2. Once you have received the above email, you will be directed to the IQT website, www.iqttesting.com, to schedule your examination. You may also reach this page by going to http://fincert.org/portal.html and selecting the "Certification Management Portal" link.


ISO-QUALITY TESTING, INC
Welcome
to the
IQT Computer Based Testing Network
Start an Exam
Exam Registration
Proctor Administration
Rate an Exam
Rater Administration
IQT Administration (*)
Once you have made it to the IQT website, you will select the second option: Exam Registration.
©Copyright 2010 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

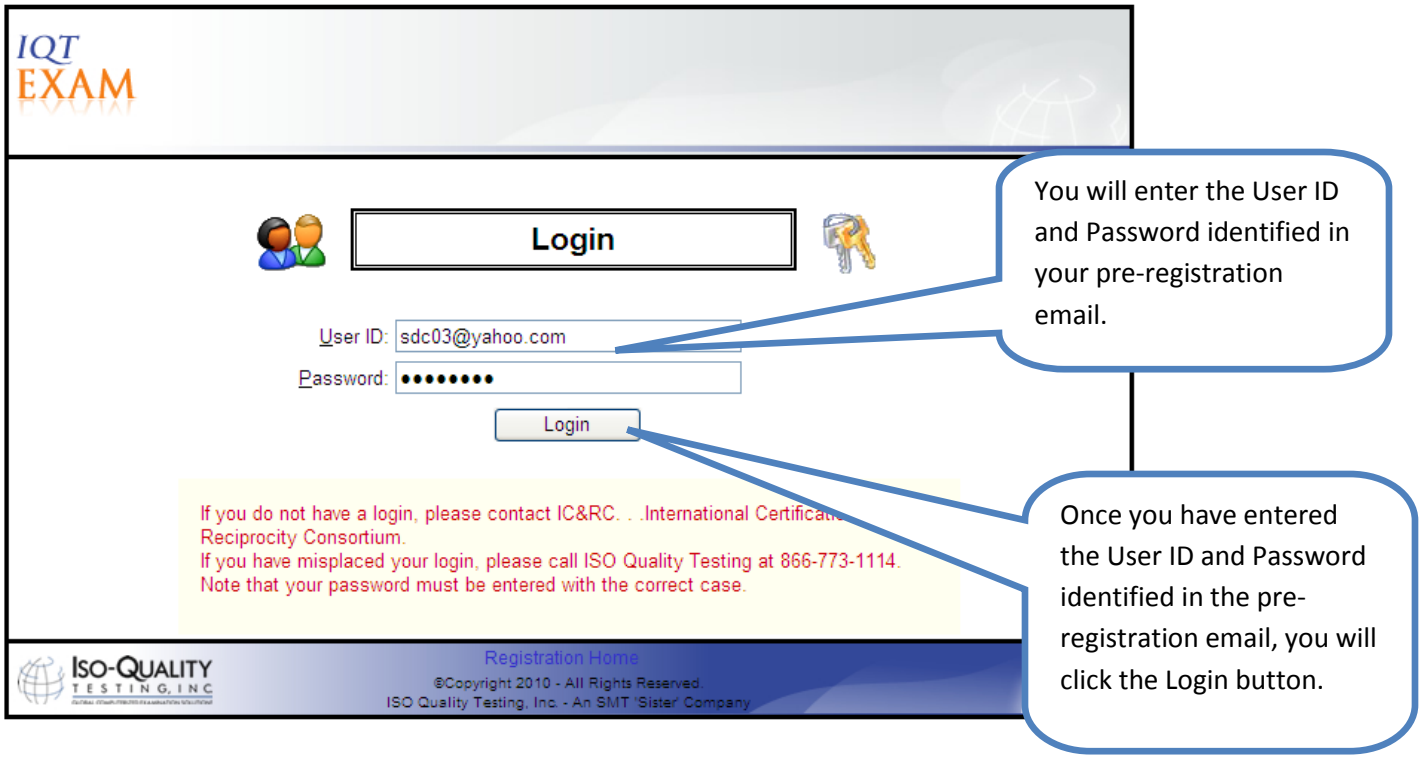
Copyright ISO-Quality Testing 2011

3. From the IQT welcome screen, you will select "CFC….Center for Financial Certifications" from the drop down list for the Organization Name as well as Exam Title you have been pre-registered for. This information can be found in the pre-registration email you received earlier (Scheduling am Exam - Step 1).


EXAM REGISTRATION
Welcome to IQT Testing!
Organization:
IC&RC. . .International Certification & Reciprocity Consortium
Exam:
Alcohol and Drug Counselor (ADC) Examination (Formerly known as Alcohol & Other Drug Abuse Counselor)
Next
IQT Home
©Copyright 2010 - All Rights Reserved
ISO Quality Testing, Inc. - An SMT Sist
In the first drop down, you will select CFC.
In the second drop down, you will select the exam you have been pre-registered for.
Once both drop downs have been selected, you will click Next.

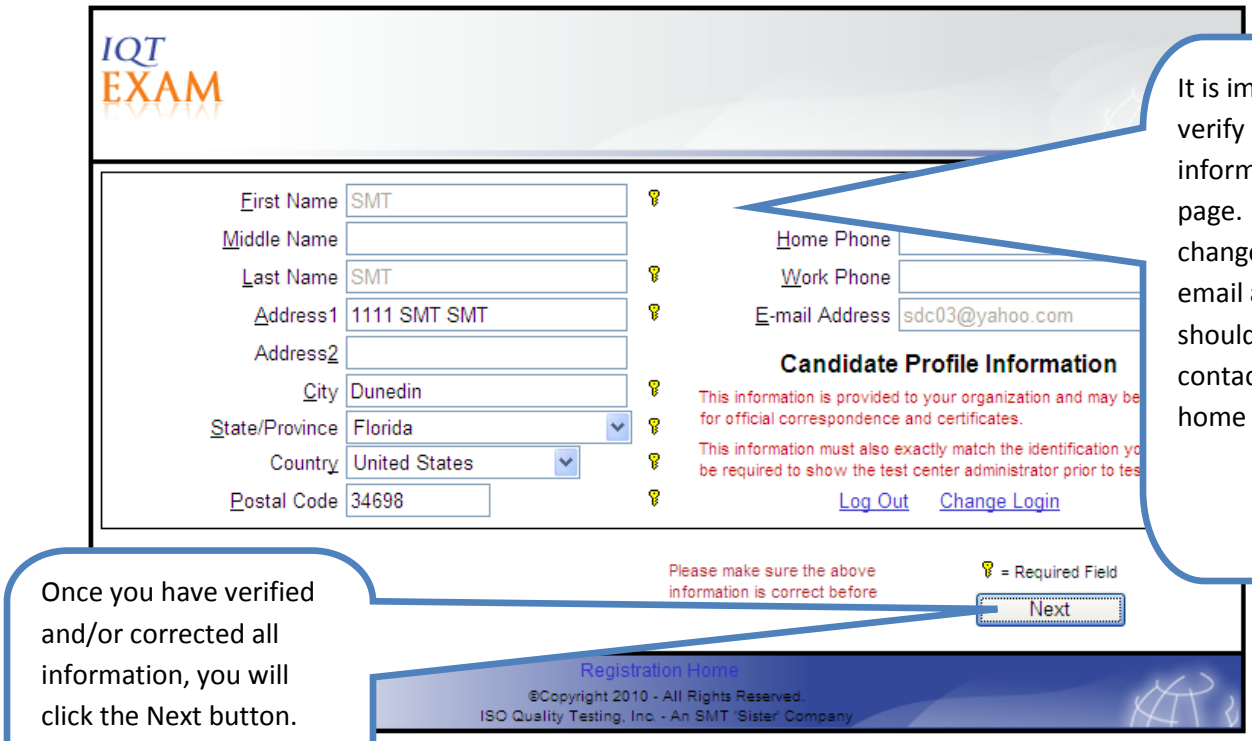
Copyright ISO-Quality Testing 2011

4. You will then be directed to the Login screen. It is important to note that you will not be able to log in unless you have been pre-registered for an exam.


IQT
EXAM
Login
User ID: sdc03@yahoo.com
Password: ••••••••
Login
If you do not have a login, please contact IC&RC. . .International Certificati
Reciprocity Consortium.
If you have misplaced your login, please call ISO Quality Testing at 866-773-1114.
Note that your password must be entered with the correct case.
Registration Home
©Copyright 2010 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company
You will enter the User ID and Password identified in your pre-registration email.
Once you have entered the User ID and Password identified in the pre-registration email, you will click the Login button.

Copyright ISO-Quality Testing 2011

5. You will then be directed to your Profile screen. It is important that you verify all information on this page, as this information is used to populate the Admission Document and status letter. Security procedures do not allow you to change your name or email address. This ensures you will not be turned away when you show up at the testing center to sit for your exam.

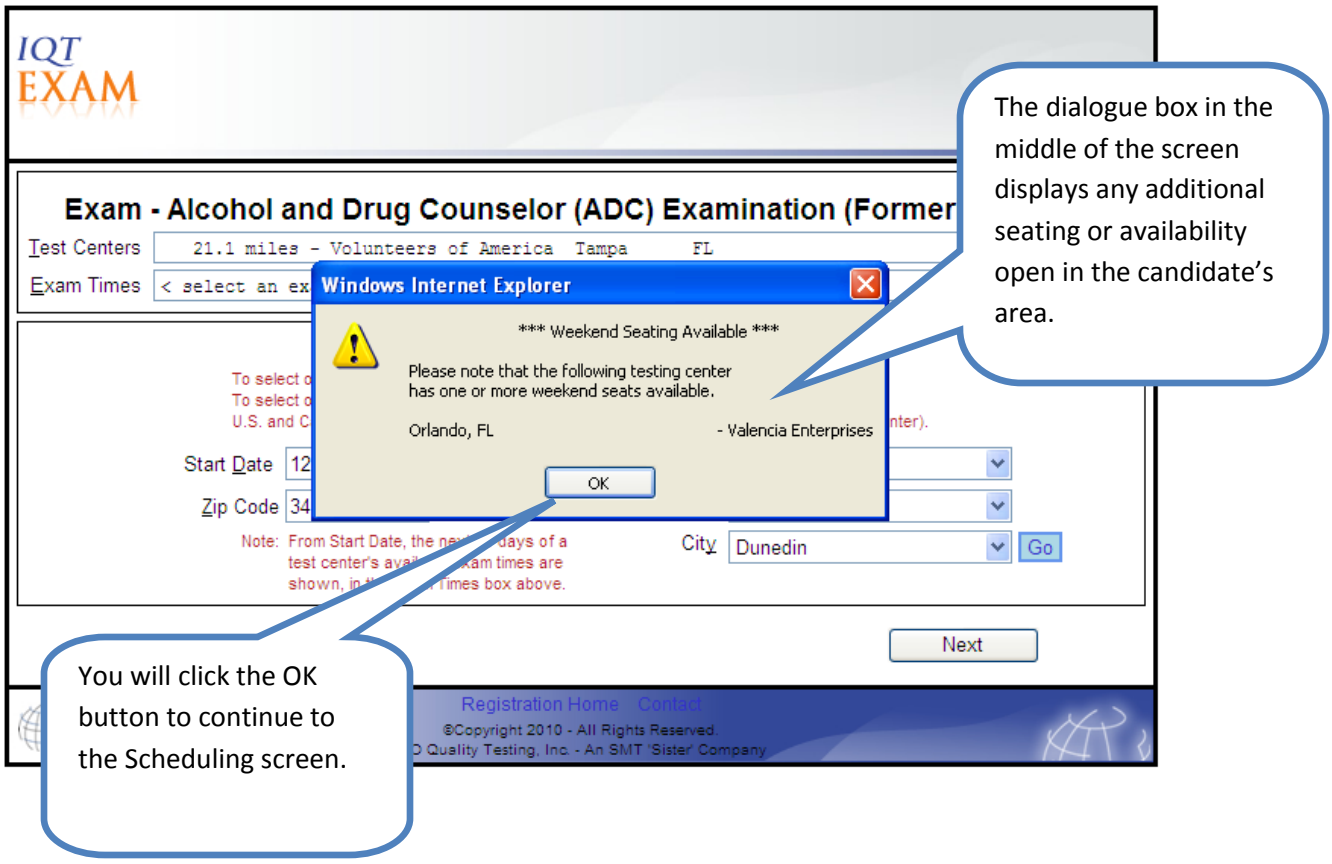


It is imperative that you verify and correct the information on this page. If you need to change your name or email address, you should do so by contacting the CFC home office.

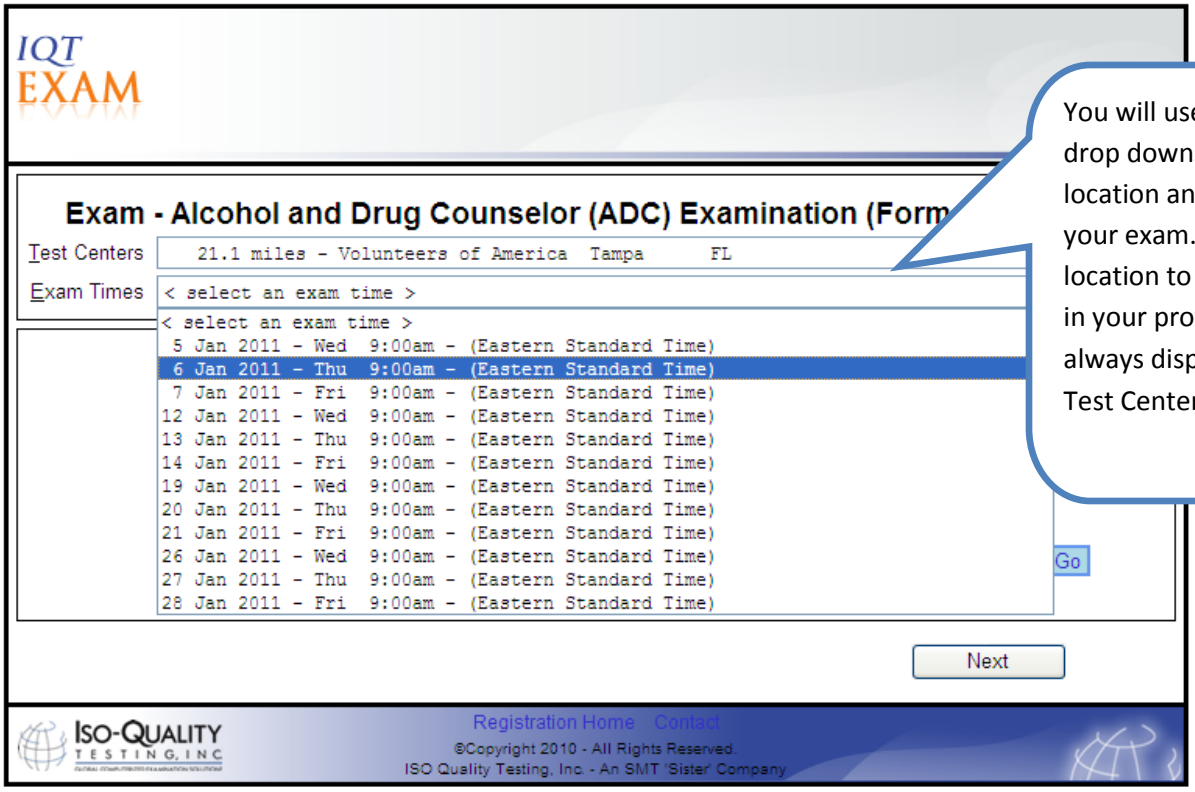
Once you have verified and/or corrected all information, you will click the Next button.

Copyright ISO-Quality Testing 2011

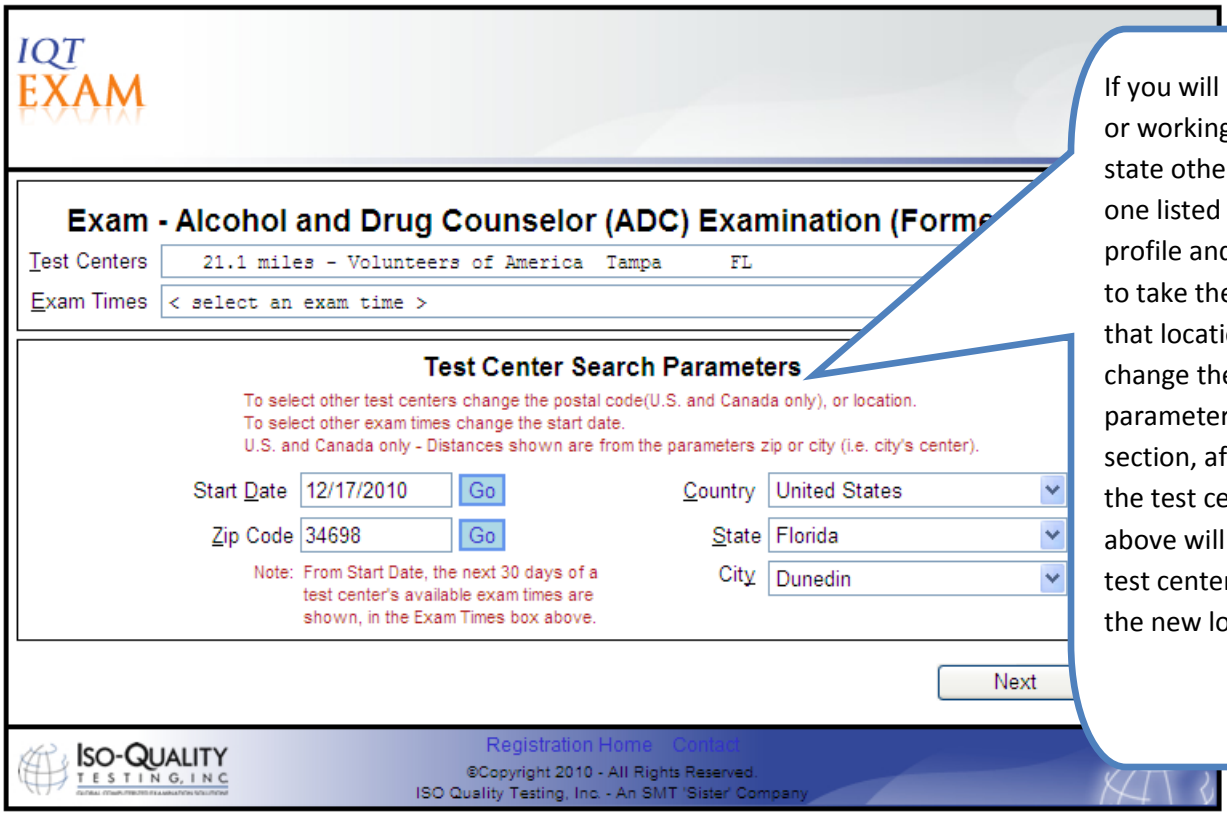
6. You will then be directed to the Site Scheduling screen. You will choose the location, date, and time of your exam. This is a real time scheduling system, so once you have selected a location, date, time for your exam and click the Next button; you are immediately confirmed for that location, date, and time.


IQT EXAM
Exam - Alcohol and Drug Counselor (ADC) Examination (Former
Test Centers
21.1 miles - Volunteers of America Tampa FL
Exam Times
< select an ex
Windows Internet Explorer
*** Weekend Seating Available ***
Please note that the following testing center has one or more weekend seats available.
Orlando, FL - Valencia Enterprises
OK
Start Date
Zip Code
City
Dunedin
Go
Next
Registration Home Contact
©Copyright 2010 - All Rights Reserved.
The dialogue box in the middle of the screen displays any additional seating or availability open in the candidate's area.
You will click the OK button to continue to the Scheduling screen.

Copyright ISO-Quality Testing 2011

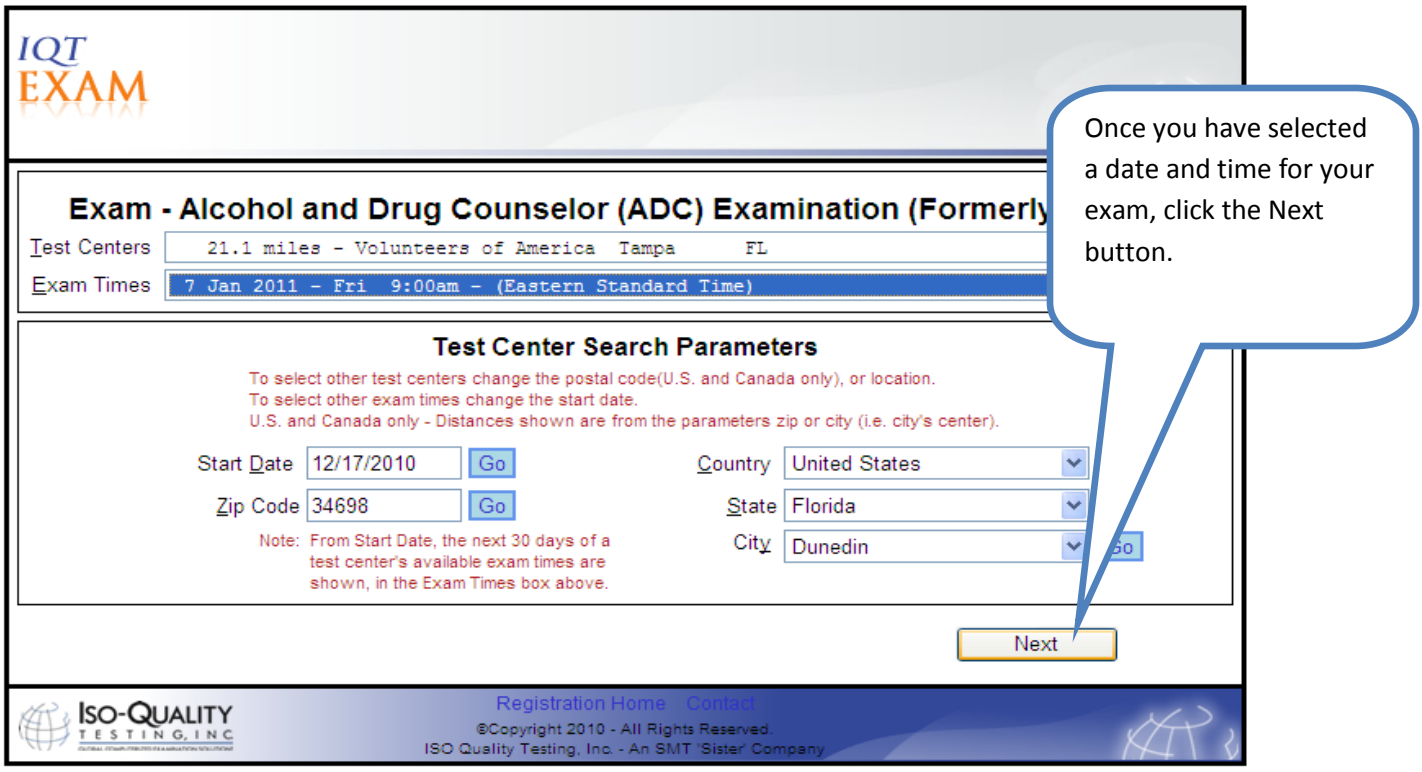

IQT
EXAM
Exam - Alcohol and Drug Counselor (ADC) Examination (Form
Test Centers
21.1 miles - Volunteers of America Tampa FL
Exam Times
< select an exam time >
< select an exam time >
5 Jan 2011 - Wed 9:00am - (Eastern Standard Time)
6 Jan 2011 - Thu 9:00am - (Eastern Standard Time)
7 Jan 2011 - Fri 9:00am - (Eastern Standard Time)
12 Jan 2011 - Wed 9:00am - (Eastern Standard Time)
13 Jan 2011 - Thu 9:00am - (Eastern Standard Time)
14 Jan 2011 - Fri 9:00am - (Eastern Standard Time)
19 Jan 2011 - Wed 9:00am - (Eastern Standard Time)
20 Jan 2011 - Thu 9:00am - (Eastern Standard Time)
21 Jan 2011 - Fri 9:00am - (Eastern Standard Time)
26 Jan 2011 - Wed 9:00am - (Eastern Standard Time)
27 Jan 2011 - Thu 9:00am - (Eastern Standard Time)
28 Jan 2011 - Fri 9:00am - (Eastern Standard Time)
Go
Next
Registration Home Contact
©Copyright 2010 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

You will use these two drop downs to identify a location and time for your exam. The closest location to the address in your profile will always display in the Test Center field.

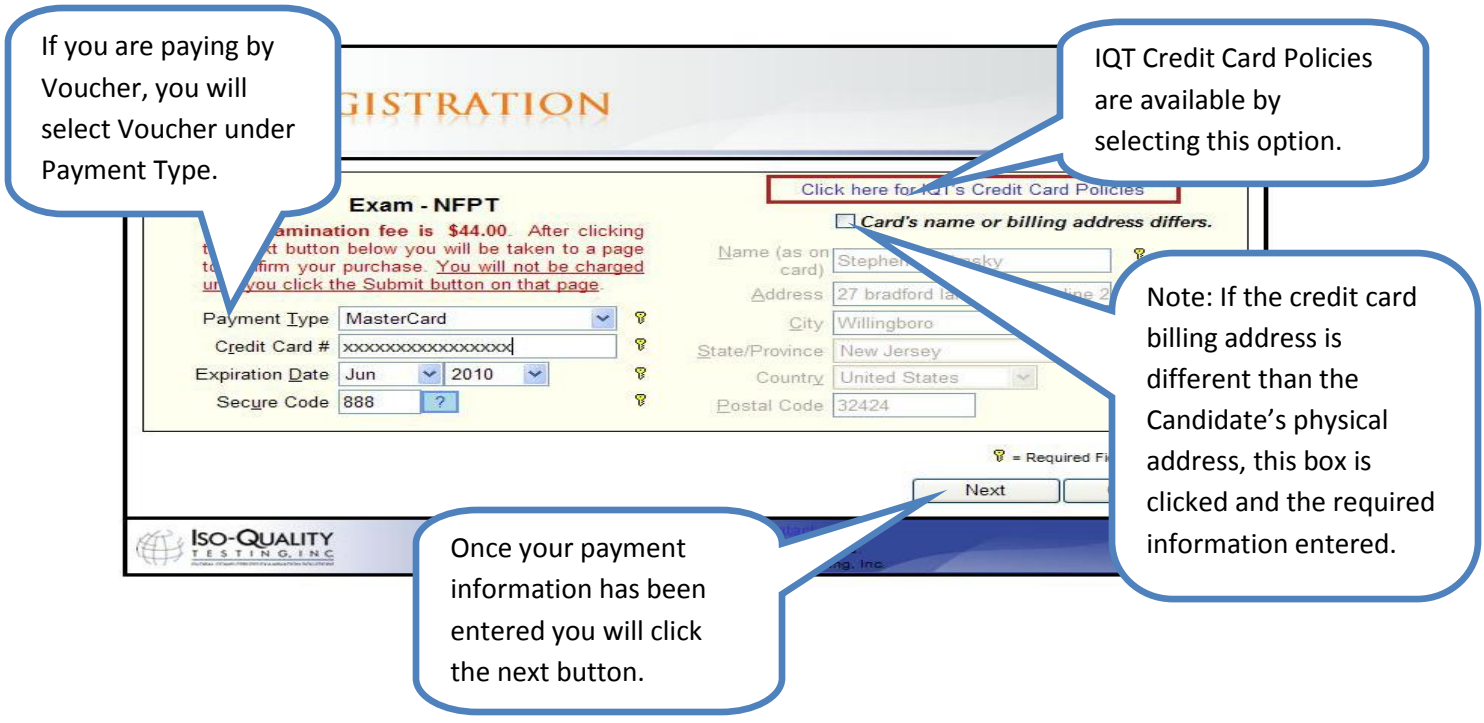

IQT
EXAM
Exam - Alcohol and Drug Counselor (ADC) Examination (Forme
Test Centers
21.1 miles - Volunteers of America Tampa FL
Exam Times
< select an exam time >
Test Center Search Parameters
To select other test centers change the postal code(U.S. and Canada only), or location.
To select other exam times change the start date.
U.S. and Canada only - Distances shown are from the parameters zip or city (i.e. city's center).
Start Date 12/17/2010 Go
Zip Code 34698 Go
Note: From Start Date, the next 30 days of a test center's available exam times are shown, in the Exam Times box above.
Country United States
State Florida
City Dunedin
Next
Registration Home Contact
©Copyright 2010 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

If you will be traveling or working in a city or state other than the one listed in your profile and would like to take the exam in that location, you can change the search parameters in this section, after which, the test center field above will display the test centers closest to the new location.

Copyright ISO-Quality Testing 2011

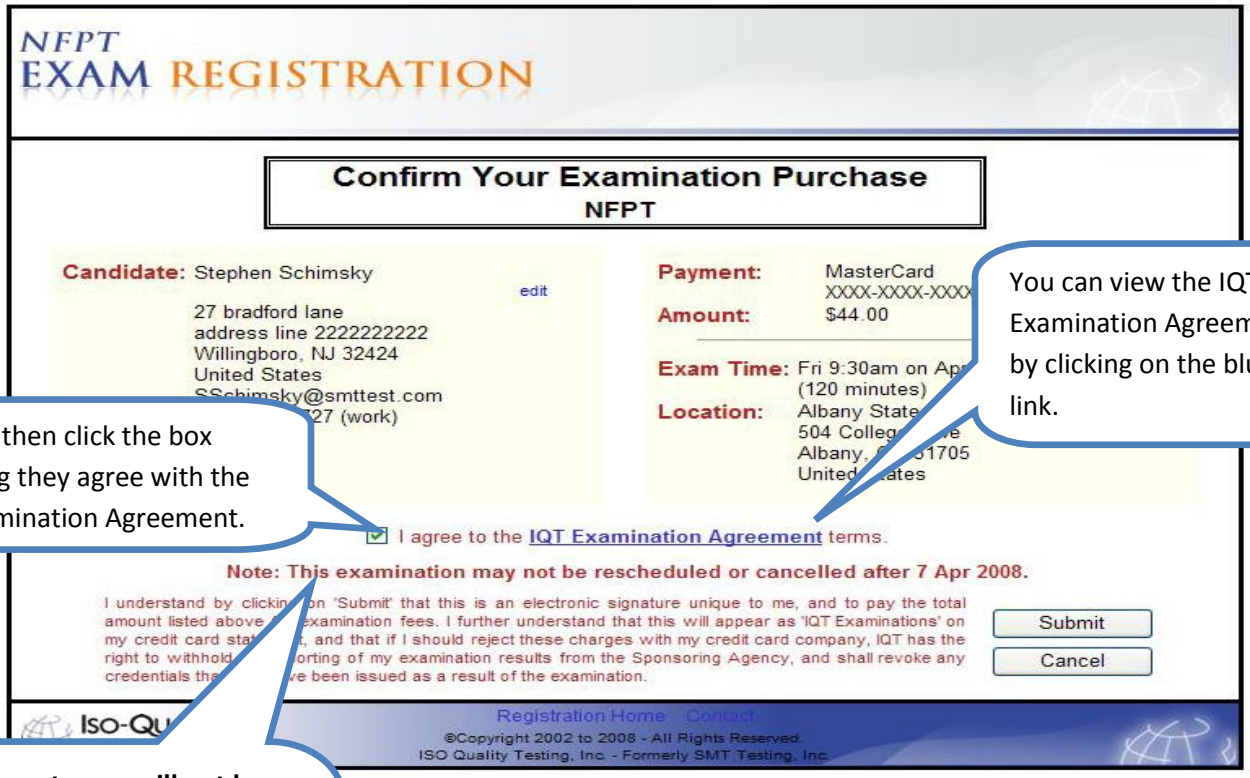

IQT EXAM
Exam - Alcohol and Drug Counselor (ADC) Examination (Formerly
Test Centers
21.1 miles - Volunteers of America Tampa FL
Exam Times
7 Jan 2011 - Fri 9:00am - (Eastern Standard Time)
Test Center Search Parameters
To select other test centers change the postal code(U.S. and Canada only), or location.
To select other exam times change the start date.
U.S. and Canada only - Distances shown are from the parameters zip or city (i.e. city's center).
Start Date 12/17/2010 Go
Zip Code 34698 Go
Note: From Start Date, the next 30 days of a test center's available exam times are shown, in the Exam Times box above.
Country United States
State Florida
City Dunedin
Next
Registration Home Contact
©Copyright 2010 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company
Once you have selected a date and time for your exam, click the Next button.

7. Once you have selected a location, date, and time for your exam you will be prompted to pay the $60.00 exam fee.


If you are paying by Voucher, you will select Voucher under Payment Type.
GISTRATION
Exam - NFPT
Click here for IQT's Credit Card Policies
Card's name or billing address differs.
Payment Type MasterCard
Credit Card # xxxxxxxxxxxxxxxx
Expiration Date Jun 2010
Secure Code 888
Name (as on card)
Address 27 bradford
City Willingboro
State/Province New Jersey
Country United States
Postal Code 32424
Next
IQT Credit Card Policies are available by selecting this option.
Note: If the credit card billing address is different than the Candidate's physical address, this box is clicked and the required information entered.
Once your payment information has been entered you will click the next button.

Copyright ISO-Quality Testing 2011

8. Once you have selected the location, date, and time of your exam and clicked the Next button, you will be directed to the Confirmation screen. You must agree to the IQT Examination agreement prior to confirming the exam scheduling choice. Once you click the Submit button, your scheduled exam is confirmed.



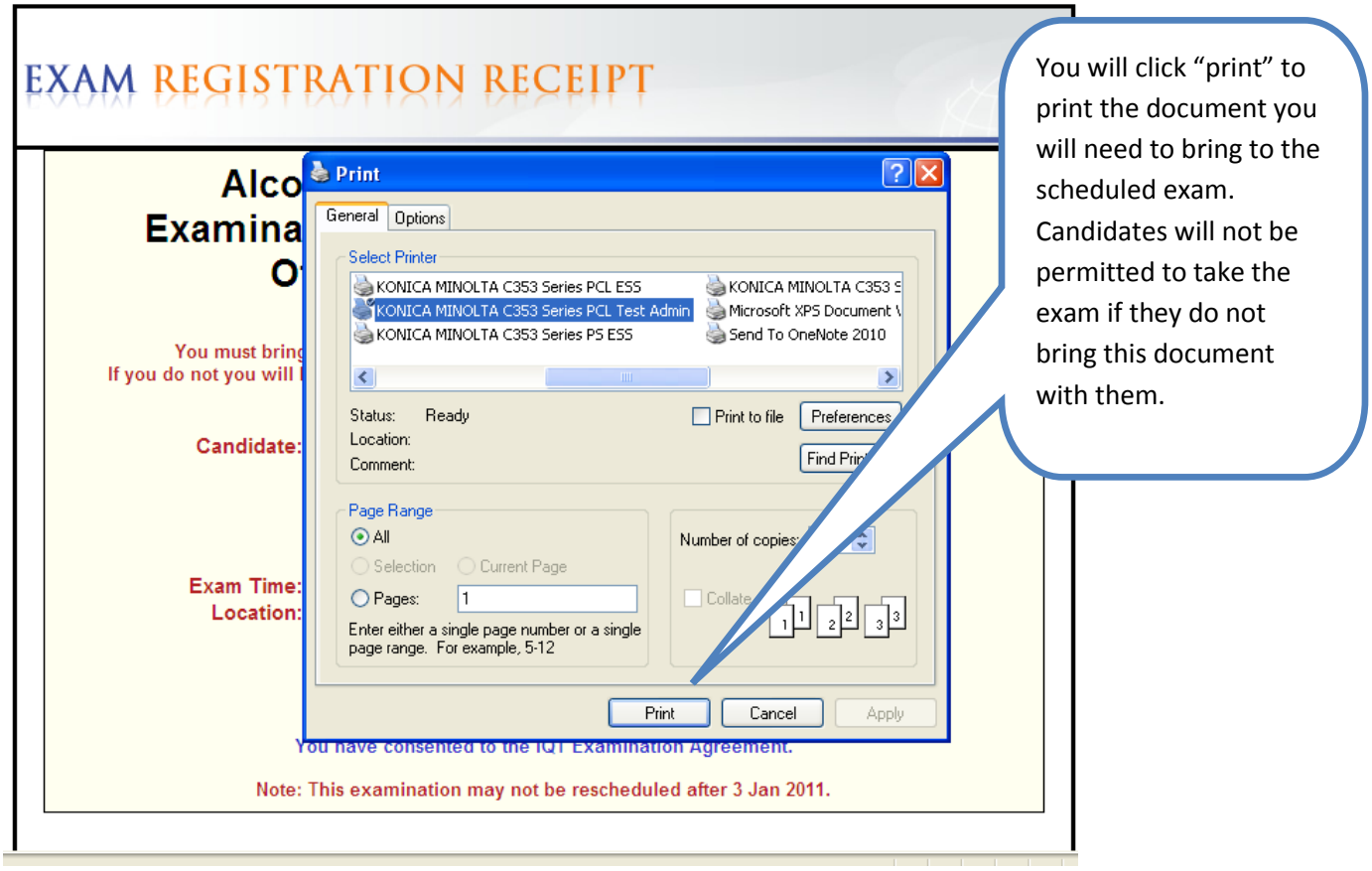
You will then click the box affirming they agree with the IQT Examination Agreement.

You can view the IQT Examination Agreement by clicking on the blue link.

Please note you will not be able to reschedule or cancel your scheduled exam after the date identified in this note. Any changes to your schedule exam will incur additional fees.

Copyright ISO-Quality Testing 2011

9. Once you have clicked the Submit button on the Confirmation screen, you will be presented with the Receipt and Admission Document. You will be immediately prompted to print this document as you will not be permitted entry to the testing center without this document and two forms of ID. If you lose or misplace the Admission Document, you may log back into your account and print this document as many times as you deem necessary.

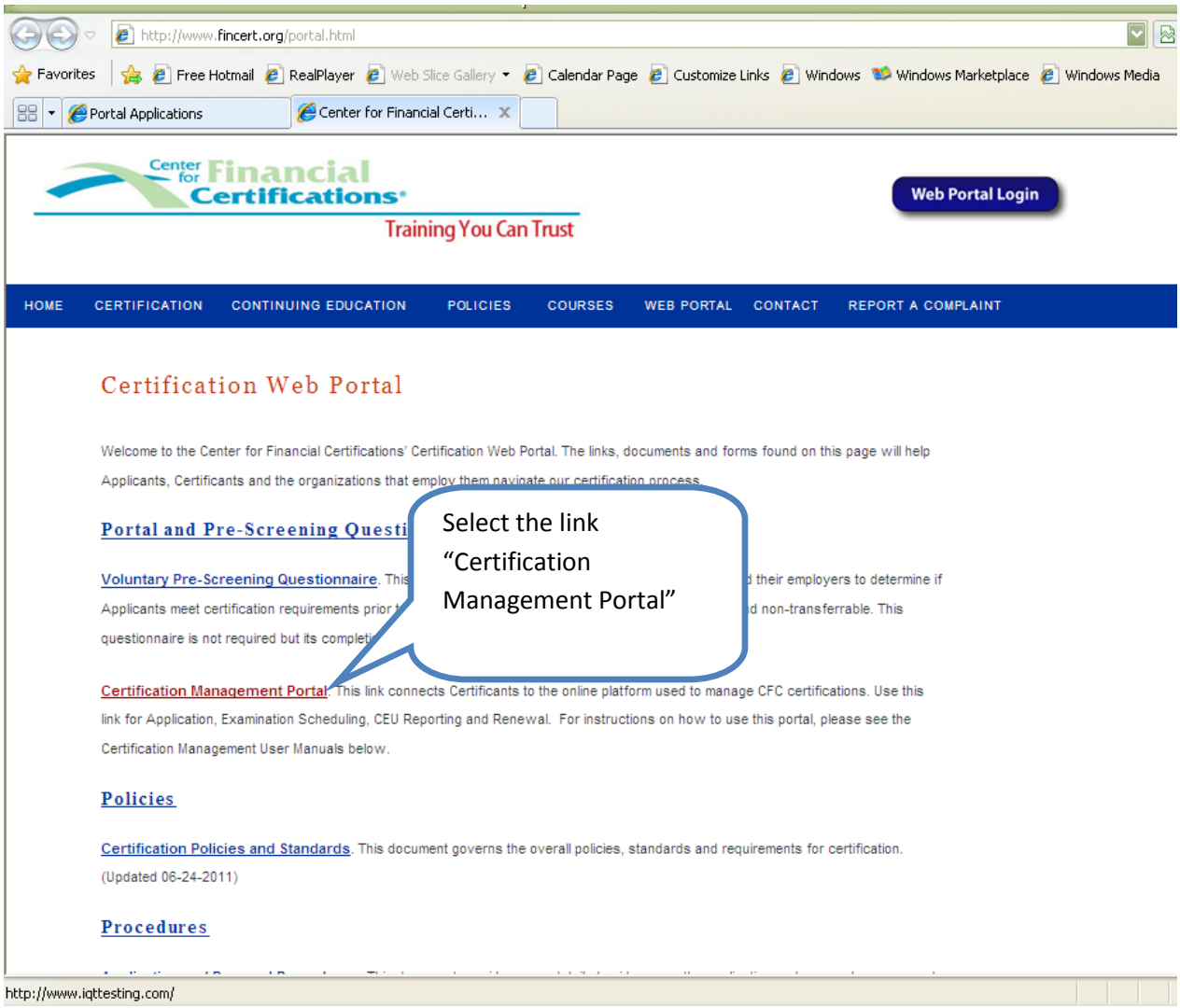


This completes the scheduling process. The candidate should read the Admission Document, as it contains all pertinent information relating to the scheduled exam.

Copyright ISO-Quality Testing 2011

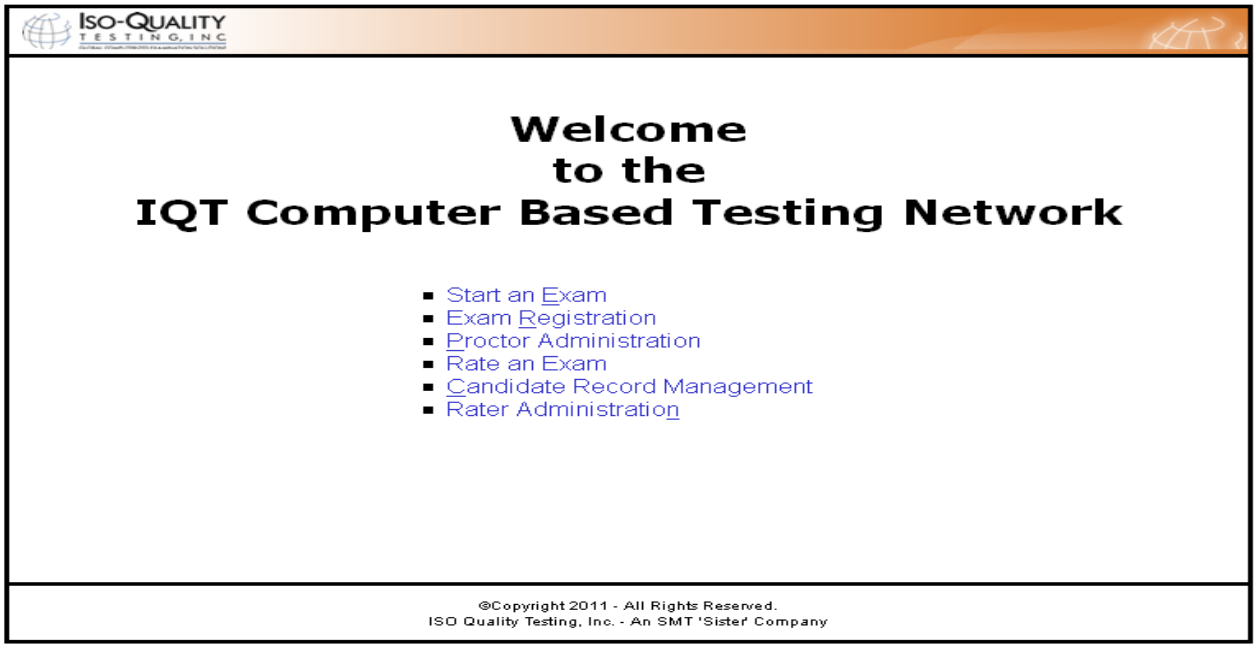
Printing a Certification Letter

1. Go to http://www.fincert.org/portal.html
2. Select the "Certification Management Portal" link


http://www.fincert.org/portal.html
Favorites
Free Hotmail
RealPlayer
Web Slice Gallery
Calendar Page
Customize Links
Windows
Windows Marketplace
Windows Media
Portal Applications
Center for Financial Certi...
Center for Financial Certifications
Training You Can Trust
Web Portal Login
HOME
CERTIFICATION
CONTINUING EDUCATION
POLICIES
COURSES
WEB PORTAL
CONTACT
REPORT A COMPLAINT
Certification Web Portal
Welcome to the Center for Financial Certifications' Certification Web Portal. The links, documents and forms found on this page will help
Applicants, Certificants and the organizations that employ them navigate our certification process.
Portal and Pre-Screening Questi
Voluntary Pre-Screening Questionnaire. This
their employers to determine if
Applicants meet certification requirements prior t
non-transferrable. This
questionnaire is not required but its completi
Certification Management Portal. This link connects Certificants to the online platform used to manage CFC certifications. Use this
link for Application, Examination Scheduling, CEU Reporting and Renewal. For instructions on how to use this portal, please see the
Certification Management User Manuals below.
Policies
Certification Policies and Standards. This document governs the overall policies, standards and requirements for certification.
(Updated 06-24-2011)
Procedures
Select the link "Certification Management Portal"
http://www.iqttesting.com/

Copyright ISO-Quality Testing 2011

3. Select Once on the IQT home page you will select the fifth option Candidate Record Management.

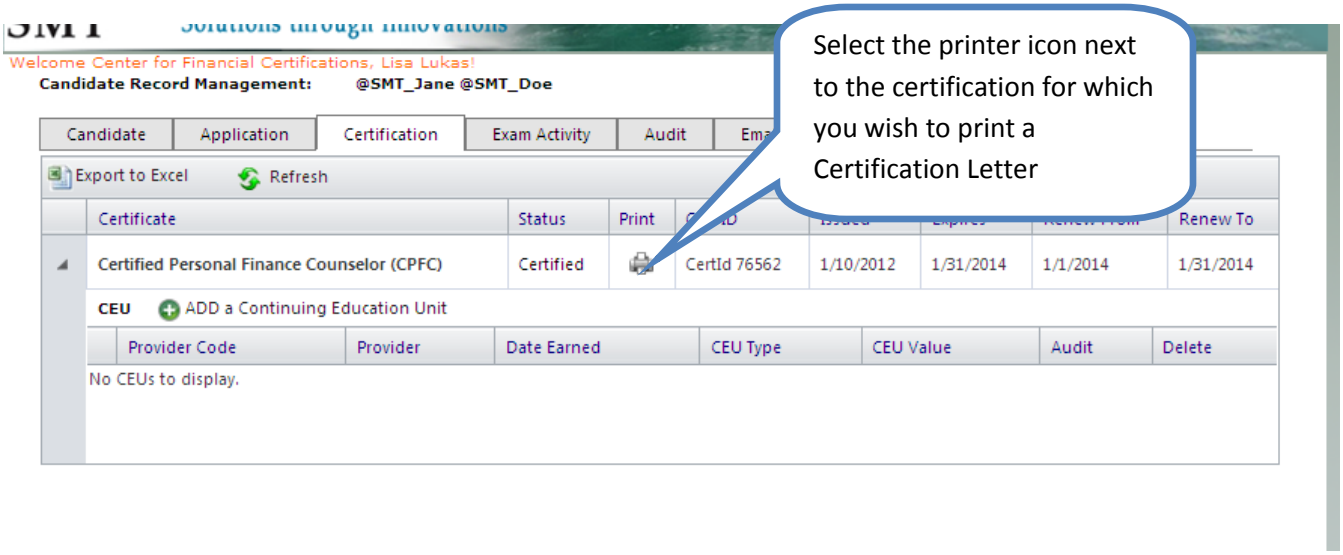


4. Please enter your IQT UserID and Password

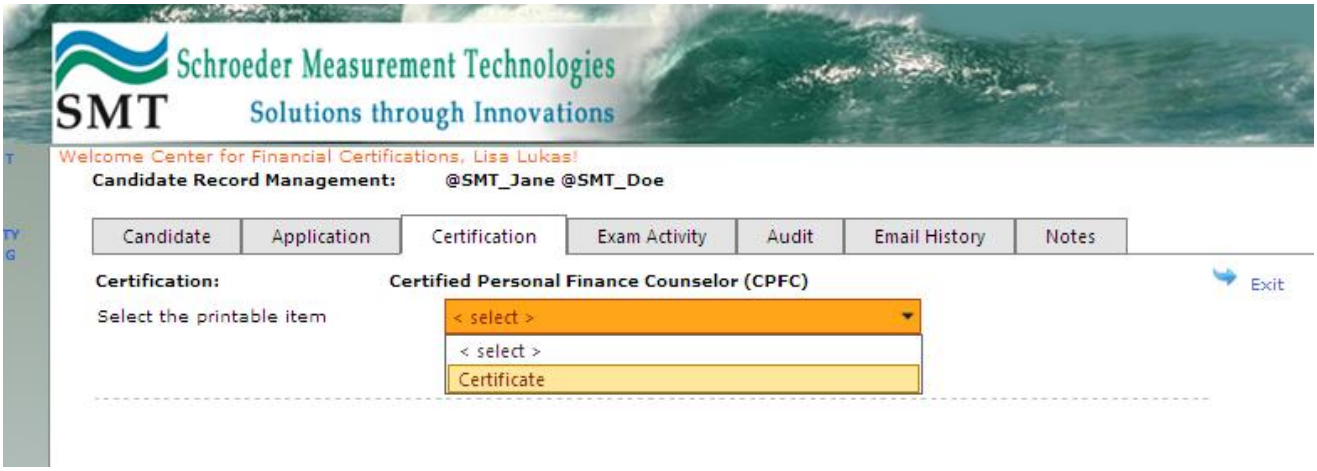
CANDIDATE RECORD MANAGEMENT
Welcome to Candidate Record Management
Login
User ID:
Password:
Login
If you do not have a login, click Register.
If you have misplaced your login, please call ISO Quality Testing at 866-773-1114.
Note that your password must be entered with the correct case.
ISO-QUALITY TESTING, INC
IQT Home Contact
©Copyright 2011 - All Rights Reserved.
ISO Quality Testing, Inc. - An SMT 'Sister' Company

Copyright ISO-Quality Testing 2011

5. Once logged in, highlight your name, then select the Certification tab. This will bring up all of your certifications that you have. Locate the Certificate that you would like to print your letter for.

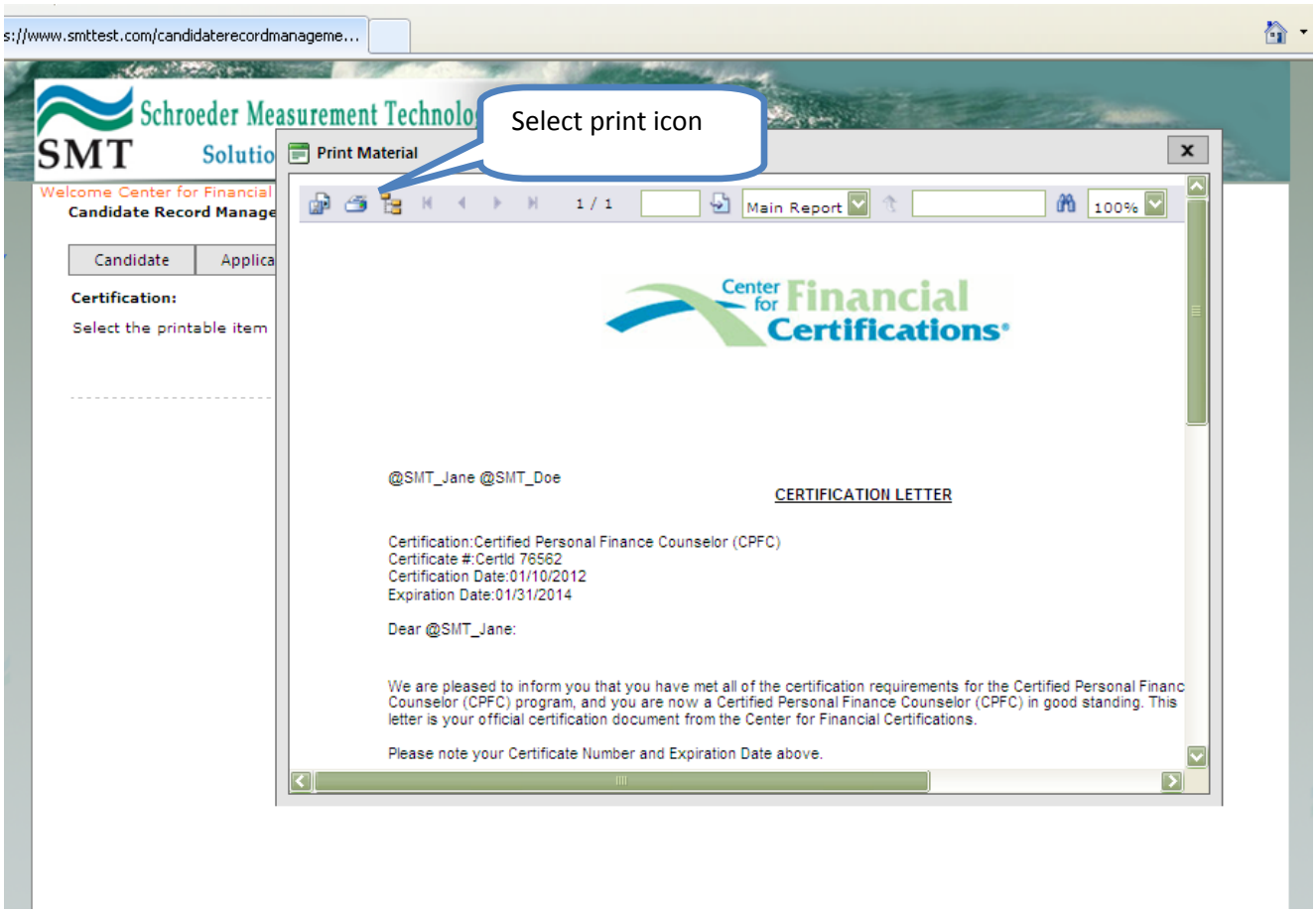


6. Select "Certificate" from the pull down list.



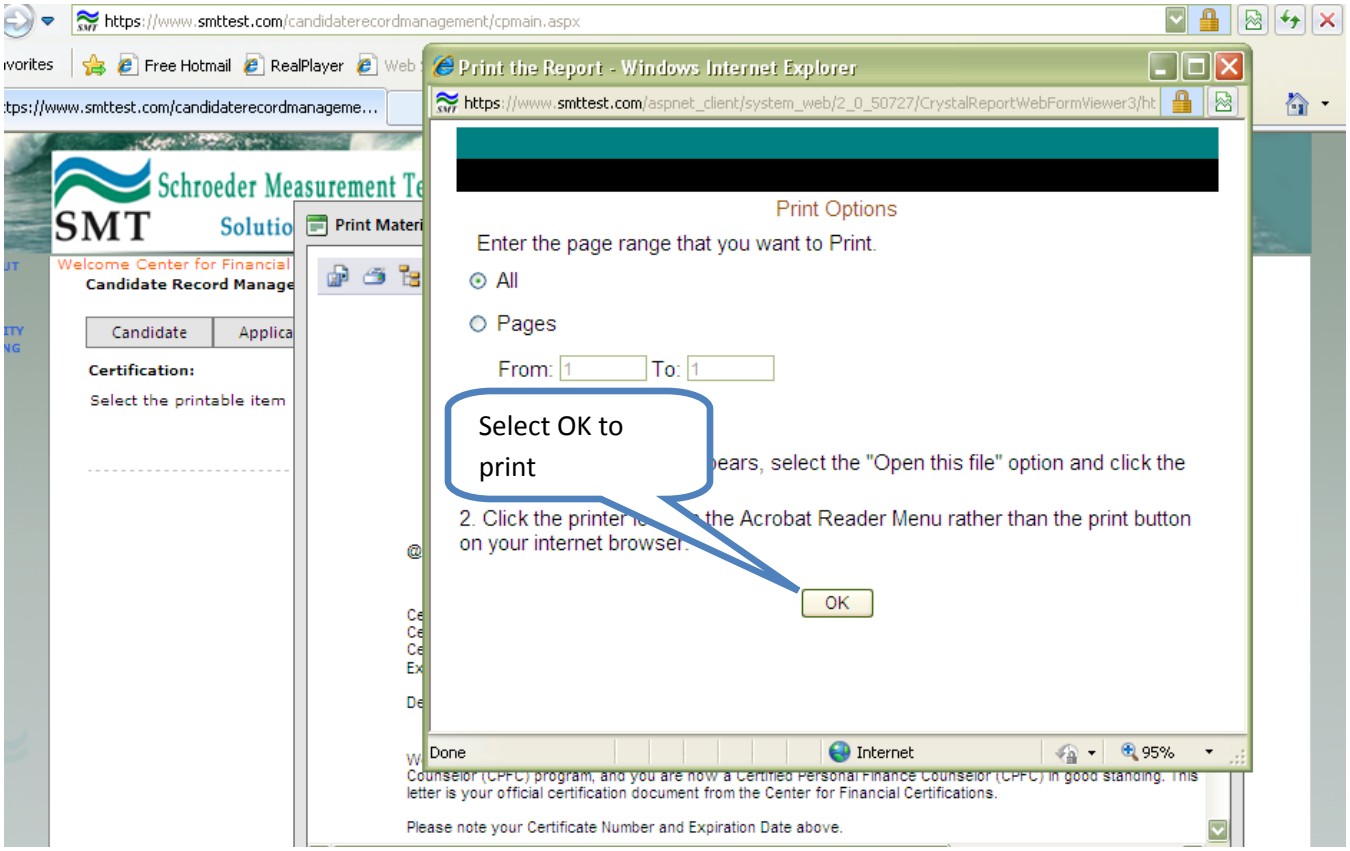
Copyright ISO-Quality Testing 2011

7. A copy of the letter will open in a new window; In the upper left hand side select the printer icon.


Select print icon
Print Material
Main Report
100%
Center for Financial Certifications
@SMT_Jane @SMT_Doe
CERTIFICATION LETTER
Certification:Certified Personal Finance Counselor (CPFC)
Certificate #:CertId 76562
Certification Date:01/10/2012
Expiration Date:01/31/2014
Dear @SMT_Jane:
We are pleased to inform you that you have met all of the certification requirements for the Certified Personal Financ Counselor (CPFC) program, and you are now a Certified Personal Finance Counselor (CPFC) in good standing. This letter is your official certification document from the Center for Financial Certifications.
Please note your Certificate Number and Expiration Date above.

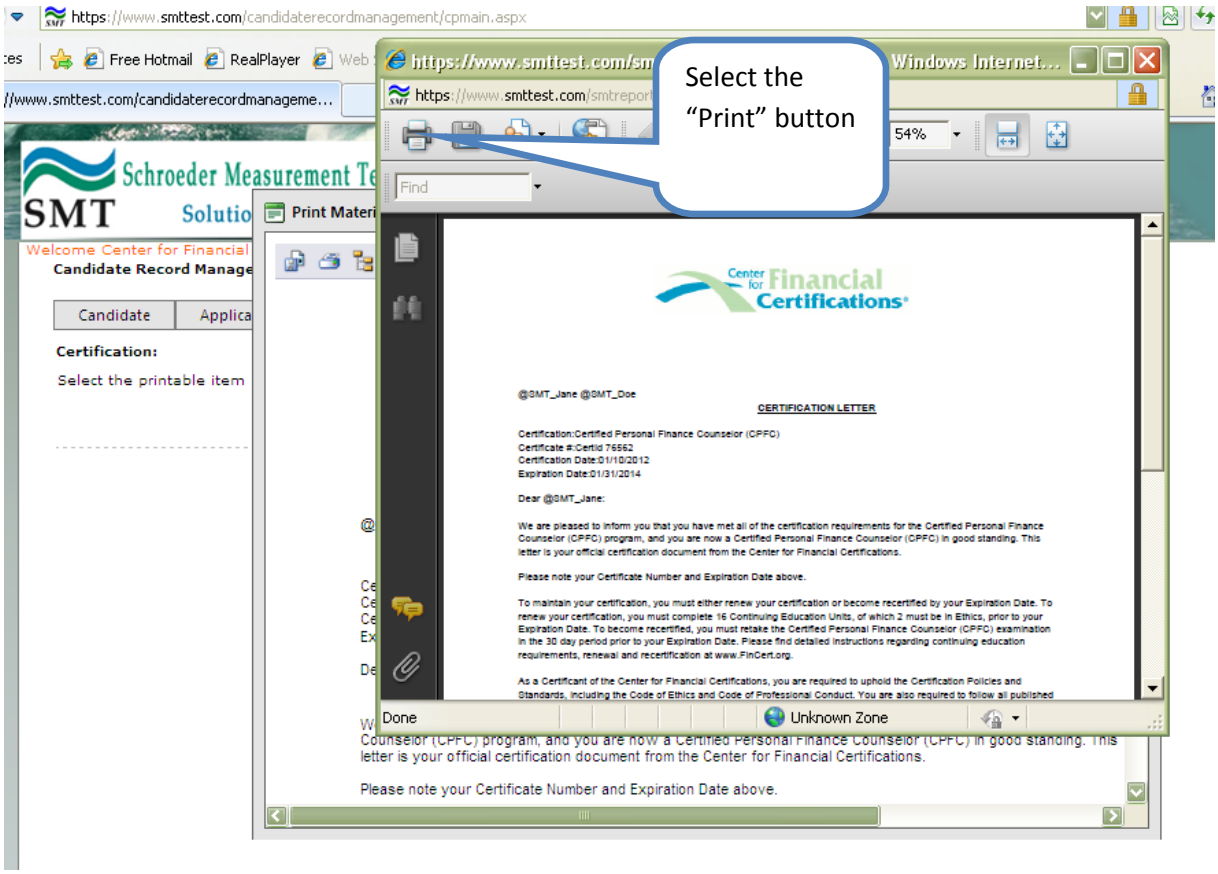
Copyright ISO-Quality Testing 2011

8. Another window come up and you will select “OK”



Copyright ISO-Quality Testing 2011

9. You letter will come up in a PDF and you will need to select the print button.


Select the "Print" button
Schroeder Measurement Te
SMT
Solutio
Welcome Center for Financial
Candidate Record Manage
Candidate
Applica
Certification:
Select the printable item
Print Materi
Center for Financial Certifications
@SMT_Jane @SMT_Doe
CERTIFICATION LETTER
Certification:Certified Personal Finance Counselor (CPFC)
Certificate #:Certid 76662
Certification Date:01/10/2012
Expiration Date:01/31/2014
Dear @SMT_Jane:
We are pleased to inform you that you have met all of the certification requirements for the Certified Personal Finance Counselor (CPFC) program, and you are now a Certified Personal Finance Counselor (CPFC) in good standing. This letter is your official certification document from the Center for Financial Certifications.
Please note your Certificate Number and Expiration Date above.
To maintain your certification, you must either renew your certification or become recertified by your Expiration Date. To renew your certification, you must complete 16 Continuing Education Units, of which 2 must be in Ethics, prior to your Expiration Date. To become recertified, you must retake the Certified Personal Finance Counselor (CPFC) examination in the 30 day period prior to your Expiration Date. Please find detailed instructions regarding continuing education requirements, renewal and recertification at www.FinCert.org.
As a Certificant of the Center for Financial Certifications, you are required to uphold the Certification Policies and Standards, including the Code of Ethics and Code of Professional Conduct. You are also required to follow all published
Done
Unknown Zone
Counselor (CPFC) program, and you are now a Certified Personal Finance Counselor (CPFC) in good standing. This
letter is your official certification document from the Center for Financial Certifications.
Please note your Certificate Number and Expiration Date above.

Copyright ISO-Quality Testing 2011